Implementing and Supporting Training for Important Change Initiatives
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About this Research
Overview

In May 2012, 225 learning leaders participated in a research study designed to identify how effectively organizations implement and support training for important change initiatives.

Ninety-percent (90%) of learning leaders stated that their internal training organizations are responsible for training or sourcing training for important change initiatives, or will be in the future. However, of those surveyed, only 25% believe that their organizations are very effective at doing so.

Many learning leaders question how their organizations can be more effective when training for important change initiatives. By also examining how both very effective and ineffective organizations handle these initiatives, the study reveals the following:

- How effective training organizations are in supporting important change initiatives
- Best practices for implementing and supporting important change initiatives
- Most common challenges during strategic planning, designing and developing, and delivering training for important change initiatives

Key Findings

- Only 25% of learning leaders feel that their internal training organizations are very effective at training for important change initiatives.
- When asked what challenges their organizations face during each phase of training, learning leaders cited schedule changes and delays as the most common challenge during the strategic planning and delivery phases.
- The two most common best practices to consider when implementing training for an important change initiative are to: ensure leadership and stakeholder buy-in and support and to deliver training in a user-preferred format, customizing content to each learner’s needs/environment.
- 95% of learning leaders from organizations that are very effective at implementing important change initiatives find best practices by partnering with a company or an individual with experience in the type of change, twice as often as ineffective organizations.
- Learning leaders stated that a lack of consideration during project timeline planning was a significant challenge during the design and development and strategic planning phases of training when implementing an important change initiative.
- When comparing very effective organizations with ineffective organizations during the design and development phase, very effective organizations provide appropriate funding and build real examples into their training program twice as often as ineffective organizations.
- When seeking resources to support important change initiatives, very effective organizations supplement their internal team with external delivery resources twice as often as ineffective organizations.
- When seeking skills from the marketplace to support an important change initiative, learning leaders cited SMEs, design and development support, technologies and tools, and delivery support, as the most commonly sought skills. However, only 22% stated that they would source program management skills.
I. Levels of Effectiveness

Learning leaders were asked to rate how effective their training organizations are at providing or sourcing training for important change initiatives within their respective companies. Only 25% of learning leaders thought their organizations were “very effective” at training or providing sourcing for important change initiatives. Roughly 18% felt their organizations were “ineffective”, as shown in Figure 1.

The groups below are defined and compared throughout this report to highlight the differences between how “very effective” and “ineffective” organizations handle training for important change initiatives.

Figure 1

When asked why they chose this level of effectiveness, learning leaders cited that their organizations either possess or lack the following attributes relating to training for important change initiatives. In order of most to least common:

- Metrics to measure their organizations’ effectiveness or a feedback mechanism
- Leadership/stakeholder buy-in & support
- Change management strategy and/or training strategy
- Experience/expertise in the area of the change initiative or in the area of training

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II. Finding Best Practices when Handling Training for Important Change Initiatives

In order to successfully implement and support training for important change initiatives, learning leaders often look to various sources to find best practices. The three most common ways that learning leaders find best practices when training for important change initiatives are to: work with SMEs, read industry articles/white papers/publications and partner with a company or individual with experience in the type of change.

When handling important change initiatives at your company, how do you find best practices for implementing that type of change?

Figure 2

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working with Subject Matter Experts (SMEs)</td>
<td>77.4%</td>
</tr>
<tr>
<td>Reading industry articles/white paper/publications</td>
<td>69.7%</td>
</tr>
<tr>
<td>Partnered with a company or an individual who has had experience with the type of change</td>
<td>69.2%</td>
</tr>
<tr>
<td>Networking with other learning professionals</td>
<td>66.1%</td>
</tr>
<tr>
<td>Attending conferences/webinars</td>
<td>58.8%</td>
</tr>
<tr>
<td>Benchmarking with others in my industry</td>
<td>48.4%</td>
</tr>
<tr>
<td>Other</td>
<td>8.1%</td>
</tr>
</tbody>
</table>

Percentage of Respondents, N=221
However, when further examining the results, there is a noticeable contrast between the responses of learning leaders from “very effective” organizations and “ineffective” organizations. Ninety-five percent (95%) of learning leaders from very effective organizations find best practices by partnering with a company or an individual with experience in the type of change, twice as often as those from ineffective organizations. See Figure 3, below.

**Figure 3**

- Partnered with a company or an individual who has had experience with the type of change: 94.5% (Very Effective, N=55) vs. 52.6% (Ineffective, N=38)
- Working with Subject Matter Experts (SMEs): 87.3% (Very Effective) vs. 68.4% (Ineffective)
- Networking with other learning professionals: 73.7% (Very Effective) vs. 65.5% (Ineffective)
- Reading industry articles/white paper/publications: 78.9% (Very Effective) vs. 63.6% (Ineffective)
- Attending conferences/webinars: 61.8% (Very Effective) vs. 44.7% (Ineffective)
- Benchmarking with others in my industry: 54.5% (Very Effective) vs. 47.4% (Ineffective)
- Other: 14.5% (Very Effective) vs. 13.2% (Ineffective)
III. Factors that Negatively Impact Training

Respondents were asked to pick the two factors that have the most negative impact on the effective delivery of training for important change initiatives. Learning leaders stated that the most common factors that negatively impact training are: conflicting priorities and projects, delays and timeline related issues and company culture/resistance to change. Interestingly, 88% of learning leaders felt that their organization had the appropriate expertise to provide training for important change initiatives.*

Which two of the following have the most impact on your ability to effectively deliver the training for important change initiatives at your company?

Figure 4

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conflicting priorities and projects</td>
<td>58.8%</td>
</tr>
<tr>
<td>Delays and timeline related issues</td>
<td>44.8%</td>
</tr>
<tr>
<td>Company culture/resistance to change</td>
<td>43.4%</td>
</tr>
<tr>
<td>Lack of funding for training</td>
<td>28.5%</td>
</tr>
<tr>
<td>Scope change for the project</td>
<td>24.0%</td>
</tr>
<tr>
<td>Participation of subject matter experts</td>
<td>18.6%</td>
</tr>
<tr>
<td>Lack of expertise within the training organization</td>
<td>11.8% *</td>
</tr>
<tr>
<td>Other</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

*Percentage of Responses, N=221
Again comparing the two groups, learning leaders from ineffective organizations cited company culture/resistance to change and a lack of funding substantially more often than effective companies when considering factors that negatively impact training.

**Figure 5**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Very Effective, N=55</th>
<th>Ineffective, N=38</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conflicting priorities and projects</td>
<td>63.6%</td>
<td>60.5%</td>
</tr>
<tr>
<td>Delays and timeline related issues</td>
<td>52.7%</td>
<td></td>
</tr>
<tr>
<td>Company culture/resistance to change</td>
<td>29.1%</td>
<td>47.4%</td>
</tr>
<tr>
<td>Lack of funding for training</td>
<td>16.4%</td>
<td>36.8%</td>
</tr>
<tr>
<td>Scope change for the project</td>
<td>21.1%</td>
<td></td>
</tr>
<tr>
<td>Participation of subject matter experts</td>
<td>21.8%</td>
<td>18.4%</td>
</tr>
<tr>
<td>Lack of expertise within the training organization</td>
<td>10.9%</td>
<td>15.8%</td>
</tr>
<tr>
<td>Other</td>
<td>3.6%</td>
<td>2.6%</td>
</tr>
</tbody>
</table>

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Funding for Training for Important Change Initiatives

Without adequate funding, many organizations struggle to meet the training needs of their employees. Figure 6 shows that overall, 31% of learning leaders stated that funding is unavailable or uncertain for training for important change initiatives.

How appropriately does your company fund the training aspects of an important change initiative?

Figure 6

When comparing the two groups, 91% of very effective organizations stated that funding is readily available for training when the business value of the change initiative is evident. However, only 34% of ineffective organizations have appropriate funding for training for important change initiatives.

Figure 7
IV. Challenges during Each Phase of Training for Important Change Initiatives

Learning leaders were prompted to select all of the challenges that they encounter during each of the three phases of training for an important change initiative. Among all of the phases, the most common challenges learning leaders face are schedule changes and delays and a lack of proper project timeline planning.

Strategic Planning

Learning leaders stated that the two most common challenges during the strategic planning phase are: schedule changes and delays and a lack of consideration for strategic planning in the project timeline.

Figure 8

- Schedule changes and delays beyond the control of the training team: 72.1%
- Project timeline lacked consideration for strategic planning: 52.9%
- Strategic Planning was not appropriately funded: 33.2%
- Training team lacked leadership support: 29.3%
- Training team lacked topic specific expertise: 25.5%
- Training team lacked change management experience: 23.1%
- Other: 6.7%

Percentage of Respondents, N=208
When comparing the two groups, learning leaders from ineffective organizations reported the following challenges substantially more often than those from very effective organizations during the strategic planning phase: lack of leadership support, lack of change management experience and inappropriate funding.

**Figure 9**

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Very Effective</th>
<th>Very/Somewhat Ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule changes and delays beyond the control of the training team</td>
<td>63.9%</td>
<td>83.0%</td>
</tr>
<tr>
<td>Project timeline lacked consideration for strategic planning</td>
<td>46.8%</td>
<td>63.9%</td>
</tr>
<tr>
<td>Strategic Planning was not appropriately funded</td>
<td>23.4%</td>
<td>47.2%</td>
</tr>
<tr>
<td>Training team lacked leadership support</td>
<td>23.4%</td>
<td>58.3%</td>
</tr>
<tr>
<td>Training team lacked topic specific expertise</td>
<td>17.0%</td>
<td>30.6%</td>
</tr>
<tr>
<td>Training team lacked change management experience</td>
<td>12.8%</td>
<td>41.7%</td>
</tr>
<tr>
<td>Other</td>
<td>8.5%</td>
<td>13.9%</td>
</tr>
</tbody>
</table>
Challenges during the Design and Development Phase

Learning leaders stated that a lack of consideration in the project timeline for training design and development is the most common challenge faced during this phase.

Figure 10

When comparing the two groups, Figure 10 illustrates that effective organizations secure appropriate funding and incorporate real life examples into their training programs twice as often as ineffective organizations during this phase of training.

Figure 11

When comparing the two groups, Figure 11 illustrates that effective organizations secure appropriate funding and incorporate real life examples into their training programs twice as often as ineffective organizations during this phase of training.
Challenges during the Delivery Phase

71% of learning leaders listed schedule changes and delays as the primary challenge during the training delivery phase.

Figure 12

For this particular phase of training, there were no significant differences in the challenges reported by very effective organizations and ineffective organizations.
V. External Resources

Learning leaders were asked to elaborate on how their training organizations both use and seek external resources when implementing training for important change initiatives. Not surprisingly, the majority of organizations use a mixture of internal and external resources, supplementing internal roles or skills as necessary.

Use of External Resources

51% of learning leaders stated that their organization uses a mix of internal and external resources when training for important change initiatives.

Which of the following best describes how your organization uses external resources to support training for an important change initiative at your company?

**Figure 13**

- We use a mix of internal and external resources on the change initiative: 50.7%
- We don’t use external resources at all: 19.5%
- We deploy our internal resources on the change initiative and back fill key roles: 16.7%
- We deploy our internal resources on the change initiative and do not back fill key roles: 10.9%
- We use only external resources on the change initiative: 2.3%

*Percentage of Respondents, N=221*
Sourcing of Resources

When seeking resources to support important change initiatives, learning leaders reported supplementing their internal training resources most often with the following: line of business resources, external design and development resources and external delivery resources.

Where do you get the resources necessary to support important change initiatives at your company?

Figure 14

<table>
<thead>
<tr>
<th>Resource Type</th>
<th>Very Effective, N=54</th>
<th>Ineffective, N=34</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line of business resources</td>
<td>58.2%</td>
<td>47.1%</td>
</tr>
<tr>
<td>External design and development resources</td>
<td>47.3%</td>
<td>44.1%</td>
</tr>
<tr>
<td>External delivery resources</td>
<td>45.5%</td>
<td>18.2%</td>
</tr>
<tr>
<td>External project management resources</td>
<td>18.2%</td>
<td>14.7%</td>
</tr>
<tr>
<td>Outsource training for initiative</td>
<td>5.5%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Other</td>
<td>3.6%</td>
<td>14.7%</td>
</tr>
</tbody>
</table>

Learning leaders from very effective organizations report that their organizations are twice more likely to supplement their internal team with external delivery resources than ineffective organizations. See Figure 14.
Essential Skills Sourced from the Market

When looking to the marketplace for skills to support training for important change initiatives, learning leaders most commonly seek: subject matter experts (SMEs), design and development support and technologies and tools. However, only 22% of learning leaders reported sourcing program management resources.

What skills do you look to the marketplace for when handling training for important change initiatives at your company?

Figure 16

<table>
<thead>
<tr>
<th>Skill</th>
<th>Percentage of Respondents, N=205</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject matter experts</td>
<td>55.1%</td>
</tr>
<tr>
<td>Design and development support</td>
<td>55.1%</td>
</tr>
<tr>
<td>Technologies and tools</td>
<td>53.7%</td>
</tr>
<tr>
<td>Delivery support</td>
<td>35.1%</td>
</tr>
<tr>
<td>Reporting and measurement support</td>
<td>26.8%</td>
</tr>
<tr>
<td>Strategic planning support</td>
<td>25.4%</td>
</tr>
<tr>
<td>Program management</td>
<td>22.0%</td>
</tr>
<tr>
<td>Other</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

Percentage of Respondents, N=205
IV. Best Practices when Handling Training for Important Change Initiatives

Learning leaders were asked to provide up to three best practices impacting how their organizations handle training for important change initiatives. Below is a summary of their responses, in order of most to least common.

- Collaborate with business leaders, subject matter experts (SMEs), and employees/end-users early and often to ensure buy-in and support for the initiative
- Deliver training how the learner wants it; provide the training in a user-preferred format and customize the content to better meet each learner’s needs
- Work with leadership and stakeholders to devise a comprehensive training/change management strategy, aligning the strategy with long-term business goals
- Communicate clearly, consistently and throughout the change process
- Identify, evaluate and secure necessary resources as early as possible (funding, SMEs/external resources, technology, etc.)
- Develop and define proper training metrics and feedback mechanisms so that programs can be modified quickly and easily, as needed
VII. About the Study

Industries Represented

Among 220 respondents, one-third (1/3) were from the top three industries: Banking/Finance, Technology, and Business Services/Consulting.

Figure 17

- Banking/Finance: 13.6%
- Technology (Computers, Software, ISP, etc.): 9.1%
- Business Services/Consulting: 9.1%
- Government (State/Local): 7.7%
- Manufacturing - Durable Manufacturing: 6.8%
- Training and Development: 6.4%
- Health care: 5.9%
- Education (K-graduate): 5.9%
- Insurance: 5.5%
- Government (Federal, including Military): 4.5%
- Telecommunications: 3.6%
- Retail: 3.2%
- Hospitality: 2.7%
- Non-profit: 2.3%
- Pharmaceuticals: 2.3%
- Utilities: 1.8%
- Construction: 1.4%
- Legal: 1.4%
- Wholesale Distribution: 1.4%
- Manufacturing - Non-Durable: 0.9%
- Media / Entertainment: 0.9%
- Medical: 0.9%
- Oil and Gas: 0.9%
- Transportation: 0.9%
- Real Estate: 0.9%

Percentage of Respondents, N=220
Company Size

Seventy percent (70%) of respondents were from companies with 500 employees or more.

Figure 18

Job Title

Approximately 55% of respondents hold leadership titles within the Training and Development space.

Figure 19
About TrainingFolks

TrainingFolks is a global provider of custom learning solutions, consulting, and contingent workforce services. Combining award-winning adult learning experience with a proven engagement methodology that includes a talented network of learning professionals, TrainingFolks collaborates with our clients to implement change. For more information, go to www.trainingfolks.com or call 866-TR-FOLKS.

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