

Cross Training Toolkit

Created by ODLs, 2003

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Introduction

Intended audience and purpose of Cross Training Toolkit

This toolkit is designed for managers, supervisors and individuals who are interested in designing and implementing a cross training program within their department. This toolkit provides the processes and procedures required for a successful cross training project.

Why cross training

Cross training allows us to increase our resources and efficiency by:

- Helping employees acquire and enhance skills, knowledge and abilities
- Making employees minimally qualified to apply for positions for which they are cross training
- Providing managers with an opportunity to increase the diversity of their own work areas
- Getting staff trained across programs and platforms
- Allowing departments to get better use of existing staff and to minimize the use of temps
- Preventing stagnation
- Offering professional development opportunities, giving the ability to make lateral moves, opening additional career paths, particularly for those in support services. Filling positions through lateral moves give us people who have greater knowledge of the organization
- Improving understanding of the different parts of departments and eventually of the organization as a whole
- Leading to better coordination and teamwork. This shapes us into a more flexible organization
- Erasing differences, misunderstandings, and unhealthy competition
- Improving overall motivation and rejuvenating departments
- Assisting the sharing of organizational goals and objectives
- Providing a recruitment advantage for entry level positions

What Cross Training Involves

The phases of a cross training effort are:

1. Analysis

This phase answers What jobs are suitable for cross-training? and What employees are suitable? The analysis phase allows you to focus on your expected outcomes by answering the question, what does someone performing the job need to know? It also allows you to assess what skills and knowledge individuals in your department have that you want to transfer to others.

2. Design and Development

Once you know the job, the employees, and the skills and knowledge that you must impart, you need to organize into a logical and practical order the process by which the employees will learn. Make sure that any instruction is geared specifically toward your target audience so that learners can most efficiently absorb the information. Your process may include such steps as arranging for learners to shadow super-users (more experienced practitioners).

3. Implementation

Once you have created your process including your training program you have to implement it. Instruction involves more than just good presentation skills; there are also logistical issues. Moving your participants through an entire process of cross-training also calls for coordination and reinforcement.

4. Evaluation

The next phase is evaluation of your cross-training. That evaluation should examine your instructional design, any training sessions, follow-up activities, and other aids designed to reinforce the mastery of the new job's requirements. Evaluation asks whether the parts of your programmed worked. Did you get what you wanted out of cross training in your employees? Evaluation will help you to improve your program.

Analysis Phase

Before you begin developing your training, it is important to answer the following questions:

1. What knowledge or skills do you want your employees to have?
2. What business impact will this cross training program produce? e.g. financial, increased efficiency, decreased down time, etc.
3. Are there other methods of achieving the same business results?

A good way of looking at this are in terms of what is the performance of employees now and what do you want their performance to be. The difference between these two states is the gap and the gap is what you want to eliminate. If what you wish to address is the capability of employees then cross training is an appropriate tool to close the performance gap. If the gap is caused by other factors such as the environment then another method of closing the gap would be more appropriate. The answers to these questions are important because they provide the justification for creating a cross training program. The information will also be useful when you conduct your task analysis.

Now that you've built your business case for cross training, you must get support and buy-in from all the managers involved. All managers involved must agree up front to a schedule for training, in-class and on-the-job. Managers must support the use of cross-trained staff when the need arises. Once you have this buy-in, consider who and what should be cross-trained.

What employees are suitable for cross training?

When considering which employees may be suitable for cross training, ask yourself:

1. Is the employee performing their current job satisfactorily?
2. Are your employees interested in learning additional skills? The wider a variety of tasks employees can accomplish the less likely they are to become bored.
3. Can the employee handle multiple tasks at once?

What jobs are suitable for cross training?

Not every job or task merits cross training. The process works best with tasks that are easily described and occur at regular intervals. A task that is undertaken once every year may not be a good candidate. The questions below should help you determine what tasks are best for cross training.

- Is there a cycle during which the job or task is performed?
- Is there another department within the organization that performs similar jobs or tasks? You might consider coordinating with that department.
- Is the job or task simple to perform? Tasks that are complex or that involve subtle nuances might not be good candidates for cross training.
- How critical is the job or task? What would the impact be if it were done incorrectly?

Once you have buy-in and have determined who and what you want to cross train, you need to break down the job or task into its component parts. This process is a task analysis. It sequences and describes observable and measurable behaviors that result in the successful performance of a task.

Task Analysis

The template that follows is designed to help you identify the component parts of the tasks you want to train. The final portion of the template includes space to write down each of the steps involved in any particular task. Use a new template for each task you need to analyze. Make as many copies as you need. Use as many of the lines provided as needed and use the back of the sheet if you require more room.

You will be writing task statements. A task statement is a statement of a highly specific action. It always has a verb and an object.

ex. Count the number of pages for each test.

Conditions of performance are a description of the circumstances under which the task is performed.

Some things to keep in mind when identifying the conditions are:

- How often is it performed?
- When is it performed?
- Is the task dependent on anything else before it can be performed?

Actions performed refer to what exactly the performer must do in order to complete that specific task.

For example:

- Staple the first 5 sheets together.
- Save the JPEG file to the appropriate folder.
- Import the file into the document.

Performance measure refers to how you and the performer will know whether they have achieved a desired level of proficiency with the task. For example:

1. Save the file as a JPEG before importing it into the document 100% of the time.

The information collected during the task analysis will be used later when you write the learning objectives and also when you develop the content.

Task Analysis Template

1. Department: _____ 2. Date: ___/___/___
3. Analyst: _____ 4. Department Supervisor: _____
5. Job: _____
6. Task Number: _____
7. Task: _____
8. Conditions of performance: _____

9. Actions performed

- a. _____

- b. _____

- c. _____

- d. _____

- e. _____

- f. _____

10. Performance Measure (How you know the job is performed successfully): _____

Design and Development

Once you have completed the analysis phase and determined what jobs and tasks you want to cross train, the next phase is that of Design and Development. This phase involves writing learning objectives, skill checks, and content for the course to train staff in the identified tasks. It also involves designing the on-the-job training (OJT) experience.

Learning Objectives

A learning objective is a statement of what the learners will be expected to do once they have completed the course of instruction. All learning objectives share three characteristics:

1. They describe the action the learner is to perform. (*Line 9 in the Task Analysis*)
2. They describe how that performance is to be measured. (*Line 10 in the Task Analysis*)
3. They describe what conditions under which the performance will take place. (*Line 8 in the Task Analysis*)

The information collected during the task analysis maps directly to the characteristics common to all learning objectives.

An example of a learning objective:

The trainee will format 10-20 test items (as available) with minimal assistance and have them reviewed by an experienced paper & pencil formatter.

There are two reasons why learning objectives are so important.

- They tell the learner what is expected from them.
- They help you select content that is appropriate for the training you are designing. Only material that will help learner's achieve the stated learning objectives should be included in the training.

Keep the following suggestions in mind when writing learning objectives. It will help you avoid some of the more common pitfalls of writing learning objectives.

1. Make them as concise as possible.
2. Use precise language. You want your learners to easily understand the learning objectives.
3. Descriptions of criteria should be easily understandable. For example "...will be judged based on test creation criteria. ". This is because you want everyone measured using the same criteria. It minimizes the instructor's bias in the equation.
4. List only the equipment and other resources that would not be obvious to a reasonable person.¹

¹ (Rothwell, William J., Kazanas, H. C., (1998). Mastering the Instructional Design Process. A Systematic Approach (2nd ed.), pp 165-166 Jossey-Bass/Pfeiffer San Francisco

Course Content

Once you have established your learning objectives you can then begin designing your course. Remember, learning objectives serve as the foundation upon which you build your course. Think of them as a road map.

Opening – The opening is your first opportunity in front of your participants. Introduce yourself; make them aware of the objectives and the agenda for the day. You should also begin any administrative tasks such as attendance.

Objectives – These are always written first. They have already been discussed earlier in this toolkit. Write them on a flip chart and include them in participant guides you give the participants. This helps keep learners focused on why they are there.

Skill check – This is how you determine if you have achieved your objectives. It is your final opportunity to make sure learners understand the material they have been presented with. It can be achieved using various methods such as a test, asking participants to perform the job or task without any assistance or any method that shows the instructor the participant knows and understands the task or job. The skill check should measure the level of learning that took place during the training session. This is touched on again later in the toolkit in the evaluation section.

Practice & feedback – As participants work their way through the training it is absolutely critical that they be given the opportunity to practice what they have been taught in a non-threatening environment. The best way to learn something new is to have the chance to do it, repeatedly. Allow your learners to practice what they have been taught. Allow them to make mistakes in a safe environment where the only repercussion of a mistake is that they are given the opportunity to correct it. Learners in a corporate environment thrive on feedback, especially if it is something with which they are unfamiliar. “No news is good news” is the wrong attitude to have when it comes to giving feedback. Help the learners to understand the information you have provided them with. Use case studies or ask them for examples from their work. Go through the example all the way with them allowing them to take the lead. Make sure you answer all their questions and provide corrections to them as they are performing the required behavior.

Content – The content you provide to learners should be directly related the learning objectives. Content should consist of information learners must have in order to meet the learning objectives. Try not to include “nice to know” information. Stick to the fundamentals. There will be time after the training session for learners to pick up on the “nice to know” information. Content should be broken up and organized meaningfully, and should be explained then demonstrated. Also everyone has different ways they prefer to learn. To appeal to different learning styles, use a variety of media whenever possible, including text, graphics, audio narration, video, and hands on activities.

WIIFMs – This stands for What's In It For Me. One of the most important factors that affect learning is relevance. Why is this content important? Is there a connection between this material and something they already know that they can add to? The more parallels between what your learners know and what you want them to know the easier it will be for them to remember and use the new information. Part of creating that parallel is telling what the benefits of learning this information are.

Summary – At the end of the training session you will want to summarize and close the training session. The summary allows learners one last opportunity to absorb relevant information. You want to give them every opportunity to ask questions. The more they are exposed to the information the more likely it is they will retain it.

Close – The close is when you have your last opportunity to have your participant's undivided attention. Wrap up any unfinished administrative details such as attendance or making them aware of additional related training or feedback opportunities.

A sample lesson plan template follows. Use it or design your own, but use one to help you organize your information into a plan of what you intend to do during the training session.

Lesson Plan Template

Title:
Written by:
Date:

Objectives: At the end of the session, the trainees will be able to:

1. _____
2. _____
3. _____

Session time (estimated amount of time training will take): _____

Number of participants: _____

Equipment needed:

1. _____
2. _____
3. _____

Introduction: _____

Body: _____

Close: _____

On-the-job Training Design (OJT)

When you are designing the OJT portion of your cross training program, you need to consider the following points:

1. The progression of skills the trainee will work on

A slow progression of tasks from easy to complex, short to long, will insure greater success. Consider how you can gradually train so that the trainee is exposed to all the tasks in the area over an extended period of time.

2. The schedule of OJT

Both managers need to agree to a fixed schedule defining what day(s) the trainee will on site, how much time they will spend there, and what times they arrive and leave. There needs to be consistency to the schedule. Select a day each week, e.g., every Monday for the whole day.

3. Who will be your mentors

The mentors you choose will be checking the trainees work when they are on site and then coaching the trainee on how they could improve their work. Therefore, mentors need to have a thorough understanding of the process they will be coaching; they are likely to be your most experienced people. Like the trainee, they need to have an interest in and commitment to the cross training process. It is best to have the same mentor and trainee work together for the length of the OJT experience. Once you have made your mentor selections, you need to inform them of your expectations about schedule, time commitment, progression of training and evaluation.

Implementation

When you are ready to begin your cross training program, you will be implementing, first, an in-class program to familiarize the trainee with the process, tasks, or software. Then, you will be implementing an on-the-job training program to build off the in-class experience and insure that the trainees can apply the skills they have just learned.

There are two main parts to implementing the in-class phase.

1. Making the logistical arrangements
2. Practicing the delivery of the training

1. Make sure you:

- Identify a location to conduct the training
- Reserve the room
- Confirm the reservation
- Organize the room before the training session. If possible try to do it the night before.
 - Arrange the seating so no ones view is obstructed.
 - Set up any audio/visual equipment you need.
 - Test the equipment to make sure it works properly.

Equipment you might need

- | | | |
|---------------------|----------------|---------------------|
| • Flip chart | • Tent cards | • Scissors |
| • Proxima | • Masking tape | • Tape |
| • Microphone | • Scotch tape | • cassette/Recorder |
| • Laptop | • Nametags | • TV/VCR/Overhead |
| • Screen | • Notepads | • Miscellaneous |
| • Handouts/Booklets | • Markers | |
| • Posters | • Highlighters | |
| • Sign-in sheet | • Pens/Pencils | |

2. Your presentation skills are just as important as anything else. These skills include verbal and non-verbal communication. When presenting:

- Speak clearly
- Make sure every one can hear you
- Don't speak too quickly
- Vary the pitch of your voice. Don't speak in a monotone.
- Engage your participants. Ask them questions.

Non-verbally it is important that you:

- Dress appropriately
- Make eye contact with your audience
- Don't always stand in the same place
- Smile

Public speaking can be a source of anxiety and nervousness for many people. Use the following tips to help alleviate that nervousness.

- Don't let your audience intimidate you.
They are there to learn from you, not judge you.
- Do not rush to begin speaking. Take your time and begin when you are ready.
- Use nervous energy to your advantage.
- Rehearse your presentation in from of a small group and accept constructive criticism.
- Be enthusiastic about the material you present.

A few pointers:

- Write down the objectives on a flipchart or somewhere participants will always be able to see them.
- Create a “Parking lot” An area on the flip chart to write things down you need to follow up on.
- Start and end promptly. It is a courtesy to everyone involved.
- Try to schedule a short 10 – 15 minute break every 1½ hours

Newly acquired skills and knowledge fade quickly if they are not used. Give the participants opportunities to practice their new skills within a few days of the training session. You want to make sure they will be able to keep these skills for the long term.

Implementing the OJT portion of cross training provides trainees with the needed practice and requires:

1. Selecting and orienting your mentors, then assigning them to a trainee.
2. The trainee works on site with review and coaching from his/her mentor following the progression of skills training.
3. When the mentor agrees that the trainee is proficient, a final evaluation will be completed.

Evaluation

A necessary activity for any training session is the evaluation. You want to find out if the participants liked the training session and if they were able to apply their new skills and knowledge on the job.

To find out participant attitudes toward the training session use a questionnaire. A sample form follows this page. This is done at the end of the session and answers the questions, did they like it, and was the session well organized? However, this is the least important evaluation method.

Much more important is whether participants can competently use the newly learned skills on the job. Your mentors can give you an on-going assessment of the participants success at applying their new skills. If the answer is yes then your program was successful. Congratulations, you achieved your goal.

If the answer is no, you need to find out why and correct it. The course evaluation is a good starting point for determining what in the training was not successful.

Course Evaluation

Course Title: _____ Date: _____

Instructor: _____

The statements below concern specific aspects of the course. Please indicate the extent to which you agree or disagree with each statement.

N/A = Not applicable 1 = Strongly disagree 2 = Disagree 3 = Agree 4 = Strongly agree

Course Content

- | | | | | | |
|--|-----|---|---|---|---|
| 1. Objectives were clearly explained. | N/A | 1 | 2 | 3 | 4 |
| 2. Stated objectives were met. | N/A | 1 | 2 | 3 | 4 |
| a. Objective 1 | N/A | 1 | 2 | 3 | 4 |
| b. Objective 2 | N/A | 1 | 2 | 3 | 4 |
| c. Objective 3 | N/A | 1 | 2 | 3 | 4 |
| 3. Content was relevant. (If disagree, please explain) | N/A | 1 | 2 | 3 | 4 |
| 4. Material was well organized. | N/A | 1 | 2 | 3 | 4 |
| 4.5. _____ activities and materials helped me understand the content | N/A | 1 | 2 | 3 | 4 |

Formatted: Bullets and Numbering

Comments: _____

- | | | | | | |
|---|-----|---|---|---|---|
| 1. Overall rating for the course | N/A | 1 | 2 | 3 | 4 |
| 2. Would you recommend this course to your peers? | N/A | 1 | 2 | 3 | 4 |

Comments: _____

What did you dislike about this course: _____

What did you like about this course _____

