



COMPETITIVE SOLUTIONS, INC.

Boggan & VerSteeg

Process **B**ased **L**eadership™

HOW TO CREATE AN AUDITABLE TRAINING

INITIATIVE
COMPETITIVE SOLUTIONS, INC.

1140 POWERS PLACE • ALPHARETTA, GA • 30004

PHONE: 770/667-9071 OR 800/246-8694 • FAX: 770/667-9020

E-MAIL: csi@competitive-solutions.net

AGENDA

- Introduction and Welcome
- Organizations Today
- Non-negotiable Processes
- Audit Processes
- Non-negotiable Process Deployment

CSI Background...

- Founded in 1991, Competitive Solutions, Inc. is an international consulting firm serving clients in North America, Europe, and the Pacific Rim.
- Authors of three books: *Empowering Business Teams: Been There, Done That, It Works* in 1996 and *Confessions of an UnManager* in 1997, *Buried Alive – Digging Out of the Management Dumpster* in 2004
- Soon to be released fourth book: *Leaving Your Leadership Legacy*, 2007
- Offices in Raleigh, North Carolina, Atlanta, Georgia
- Raleigh Office: 800-367-6993
- Atlanta Office: 800-246-8694



***ABOUT
COMPETITIVE
SOLUTIONS, INC.***



A Few of Our Clients...

Harley-Davidson Motor Company

Revlon

REVLON[®]

GlaxoSmithKline

Goodwill Industries



Michelin, NA

United Way of Atlanta



NISH

CCAD



***THE
EFFECTIVENESS
OF ANY TRAINING
INITIATIVE CAN BE
ASSESSED AND
MEASURED WITH
THE USE OF AN
APPROPRIATELY
DESIGNED AUDIT
PROCESS.***





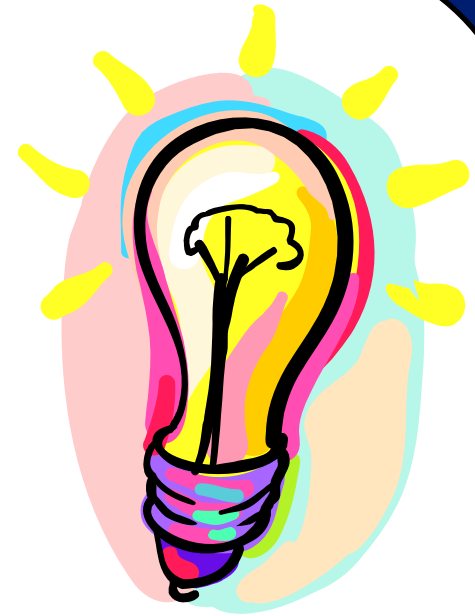
ORGANIZATIONS TODAY

Organizations Today...

- Current state: Many leaders operating as “Dumpsters” – More on our plates than ever before
- Current state: Many leaders “Managing by Personality” – Good intentions driving cultures of dependency, not accountability
- Current state: Leaders influencing through proximity, powers of persuasion, and presence of personality
- Current state: Employees looking to leaders to provide clarity, connectivity, and consistency
- Current state: Sporadic urgency, focus, and accountability driven by the crisis of the moment
- No Organizational Process to Audit

MEASURING TRAINING IMPACT

**IN ORDER TO MEASURE
TRAINING, IT MUST HAVE
PROCESS BASED OUTCOMES.
YOU CAN NOT MEASURE
PHILOSOPHICAL OR
PSYCHOLOGICAL OUTCOMES.**



NON-NEGOTIABLE PROCESSES

Organizations Tomorrow...

NON-NEGOTIABLE BUSINESS PROCESSES:

Minimum business processes
all leaders and teams perform
to remain consistent, focused
and accountable



Leadership Tomorrow...

- Leaders must set non-negotiable processes
- Leaders must set performance expectations regarding training
- Leaders must create systems that enable the measurement of the impact on the bottom line
- Leaders must utilize the processes to create and sustain:
 - A sense of urgency
 - A clear and concise business focus
 - Driven and shared accountability
 - A clearly defined audit process

NON-NEGOTIABLE PROCESSES

- **COMMUNICATION PROCESS**
- **BUSINESS SCORECARD PROCESS**
- **ACCOUNTABILITY PROCESS**
- **BUSINESS HANDBOOK PROCESS**

Non-negotiable Processes: ***Communication Process***

Creation of a scorecard driven, accountability focused communication process that consistently drives the urgency throughout the organization

Agenda:

- I. Action Register Review**
- II. Scorecard Review**
- III. Around-the-table**
- IV. Recognition**
- V. Pass Up/Pass Down**
- VI. Action Register Review**
- VII. Meeting Audit**



BUSINESS SCORECARD PROCESS

BUSINESS SCORECARD:

A simple and concise tracking tool designed to create a **common business language** throughout an organization.

KEY FOCUS AREA	SMART OBJECTIVES	TARGET	OWNER	TRACKING FREQUENCY						COMMENTS
				VISIBLE INDICATOR*						
				JAN	FEB	MAR	APR	MAY	JUN	
QUALITY										
SAFETY										
COST										
PRODUCTIVITY										
PEOPLE										
CUSTOMER SERVICE										

Non-negotiable Processes: Business Scorecards

- Leadership team creates key focus areas and a standard format – No more than 15 goals per scorecard – Performance is color coded, **Red/Green** – Scorecard visually projected in meeting room so that it sets the tone
- All lower teams develop tactical scorecards to support the key focus areas
- Business scorecards are reviewed in every team meeting as a standard agenda process
- Team members utilize an action register to address scorecard performance issues
- Scorecards and action registers are distributed monthly to senior leadership for review

ACCOUNTABILITY PROCESS:

ACTION	RESPONSIBILITY	TARGET	COMPLETE	COMMENTS

ACTION REGISTER:

An accountability tool designed to document critical tasks, ownership, responsibilities and target dates – ***Brings visibility to accountability***

Non-negotiable Processes: ***Accountability Process***

- Designed to be used in the following manner:
 - Break the dumpster – *Personal Action Register – Tactical representation of empowerment*
 - Meeting effectiveness – *Elevates the expectations of engagement*
 - Scorecard performance enhancement – *Any red scorecard item must have a corrective action plan*
 - Performance management – *Provides data as a measurement of engagement*
 - Build trust – *Actions = Words*



MEASURING TRAINING IMPACT

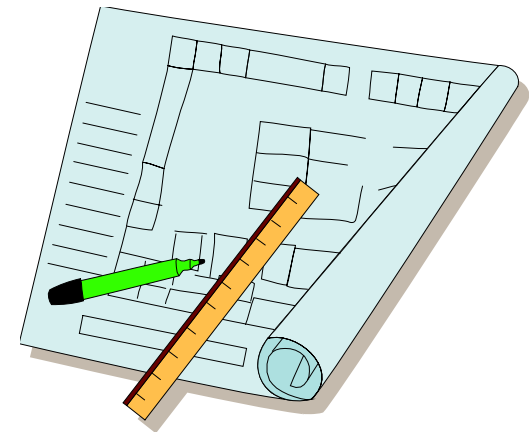
KEY STEPS FOR MEASURING TRAINING IMPACT



- 1. CREATING A STRATEGY, A PLAN**
- 2. DEVELOPING ROADMAP OUTCOMES**
- 3. STANDARD OPERATING PROCEDURES (SOP's) TO SUPPORT THE OUTCOMES**
- 4. DEVELOPING AN AUDIT PROCESS BASED ON THE OUTCOMES**
- 5. IDENTIFY ORGANIZATIONAL CHAMPION**
- 6. CREATING AND FOSTERING A CONTINUOUS IMPROVEMENT ORGANIZATION**

STEP 1: TRAINING PROCESS IMPLEMENTATION STRATEGY

- **WHERE ARE WE NOW?**
- **WHERE DO WE WANT TO BE?**
- **WHEN DO WE WANT TO GET THERE?**
- **WHAT SKILLS ARE CRITICAL TO OUR SUCCESS?**
- **WHAT RESOURCES WILL WE NEED?**
- **WHAT IS OUR TIMELINE FOR EFFECTIVENESS?**



STEP 2: DEVELOPING ROADMAP OUTCOMES

**OUTCOMES MUST BE PROCESS ORIENTED,
TANGIBLE , AND QUANTIFIABLE**

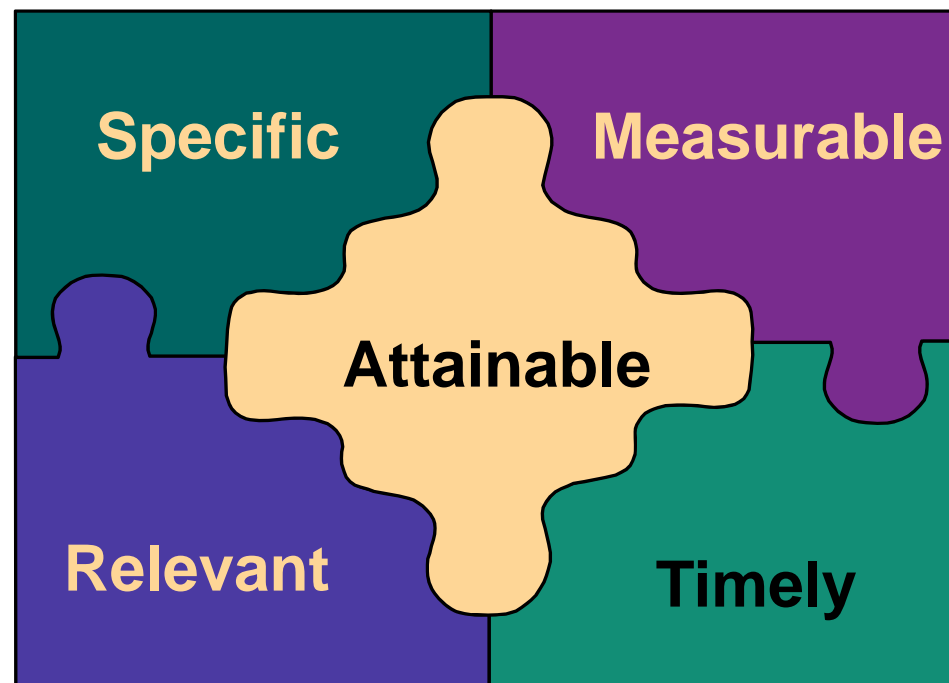
EXAMPLE: MEETING EFFECTIVENESS

As a result of training, all meetings will have

- Defined frequency
- Standard Agendas
- Minutes
- Action registers
- Ground rules
- Key roles

***STEP 2:
DEVELOPING ROADMAP OUTCOMES
(continued)***

Training outcomes must be SMART:



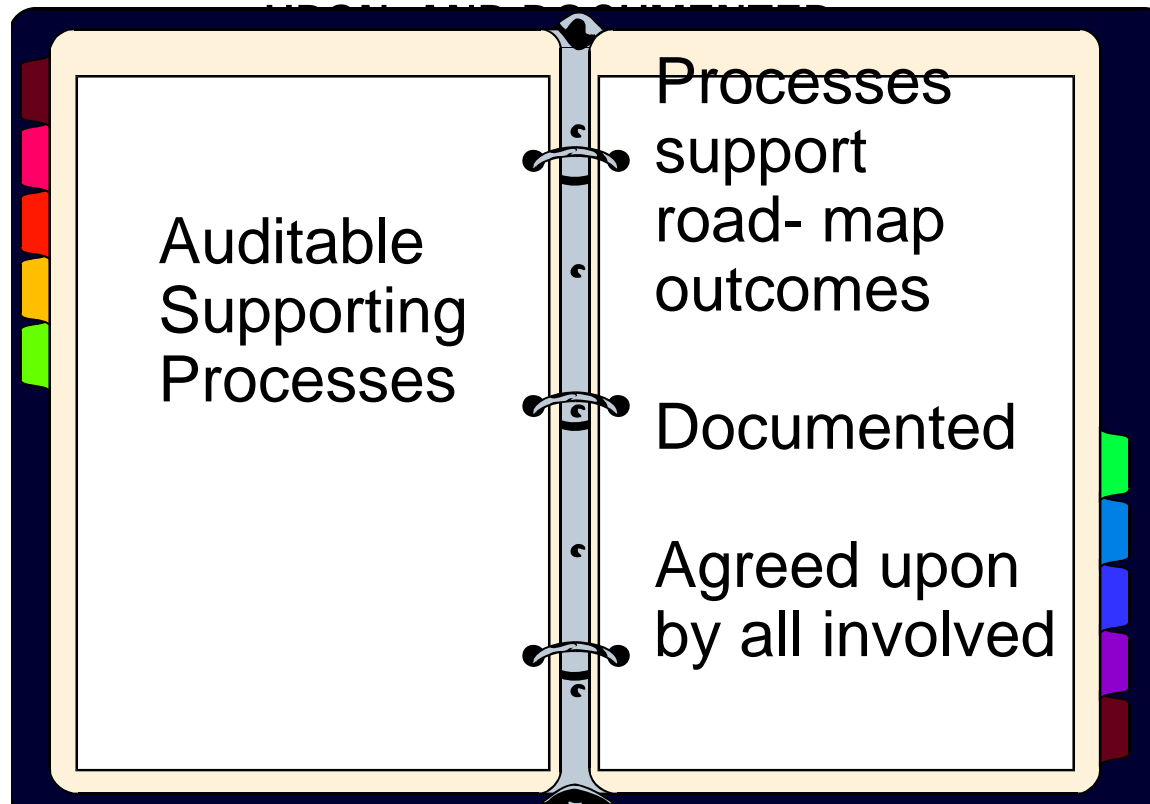
STEP 3:
SUPPORTING THE TRAINING
OUTCOMES
(continued)

STANDARD OPERATING PROCEDURES, ONCE DEVELOPED, BECOME THE AUDIT CRITERIA FOR MEASURING TRAINING EFFECTIVENESS.

DOCUMENTATION AND DISCUSSION OF THE SOP'S BUILDS OWNERSHIP FOR THE NECESSITY OF TRAINING.

STEP 3: SUPPORTING THE TRAINING OUTCOMES

INDIVIDUALS AND WORK GROUPS MUST DEVELOP PROCESSES THAT SUPPORT THE DEFINED OUTCOMES. THE SUPPORTING PROCESSES (STANDARD OPERATING PROCEDURES) MUST BE DISCUSSED, AGREED



***STEP 4:
DEVELOPING AN AUDIT PROCESS***

THE AUDIT PROCESS SHOULD:

**SUPPORT THE ORIGINAL TRAINING AND
DEVELOPMENT ROADMAP OUTCOMES**

**REINFORCE THE IMPORTANCE OF THE
TRAINING SKILL**

**COACH AND MENTOR THE USE OF THE
TRAINING SKILL AND OUTCOME**

**CREATE ORGANIZATION-WIDE
ACCEPTANCE OF THE NECESSITY OF THE
TRAINING SKILL**

***STEP 4:
DEVELOPING AN AUDIT PROCESS
(continued)***

***THE AUDIT PROCESS SHOULD:
DRIVE CONTINUOUS IMPROVEMENT
THROUGHOUT THE ORGANIZATION***

**AN EFFECTIVE AUDIT PLAN MUST HAVE
THE SUPPORT OF THE SENIOR
LEADERSHIP TEAM**

**THE AUDIT PROCESS MUST ENCOURAGE
BEHAVIORS THAT SUPPORT AND
REINFORCE THE BUSINESS**

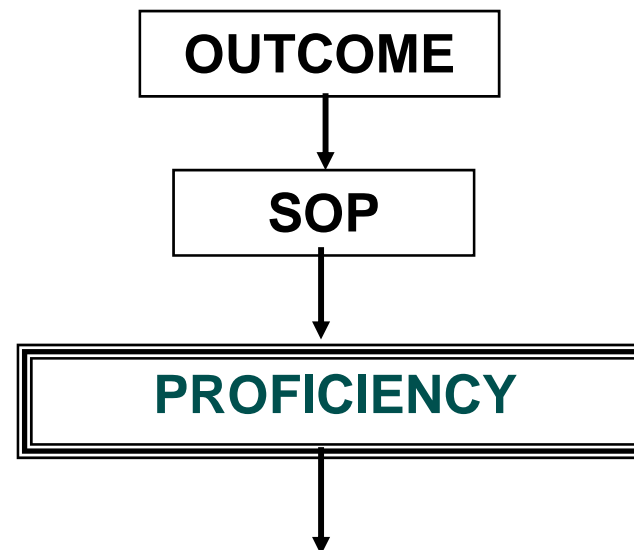
STEP 4: ACCOUNTABILITY TOOLS (continued)

**TRAINING OUTCOMES MUST BE AUDITED BY A
ROUTINE REVIEW SCHEDULE THAT FOCUSES ON
COMMUNICATION AND SUSTAINMENT**

	①	2	3	4	5	6
7	8	9	10	11	12	13
14	⑮	16	17	18	19	20
21	22	23	24	25	26	27
28	⑲	30	31			

STEP 5: UTILIZING THE AUDIT PROCESS

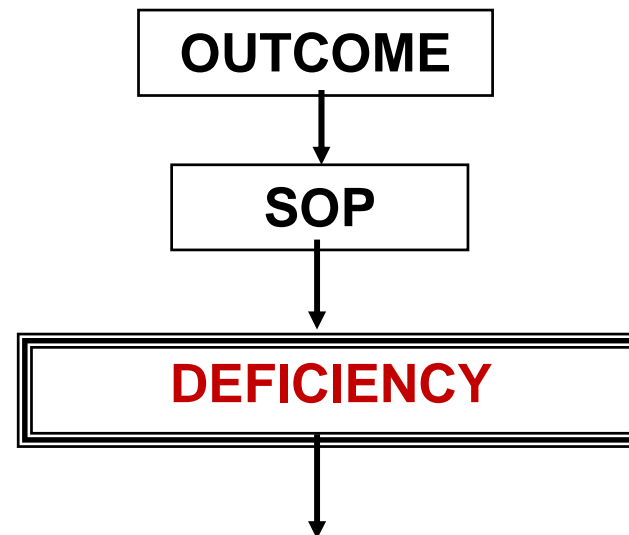
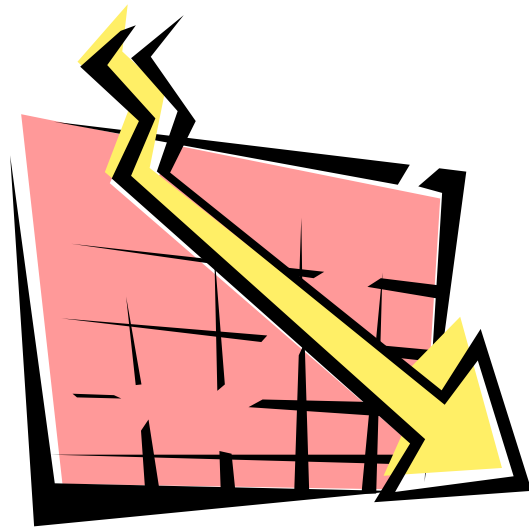
What happens when audit results indicate training skill **PROFICIENCY?**



**Keep doing what you're doing
Determine success factors
Provide recognition
Solicit ideas for the next level of skills**

STEP 5: UTILIZING THE AUDIT PROCESS

What happens when audit results indicate training skill **DEFICIENCY**?



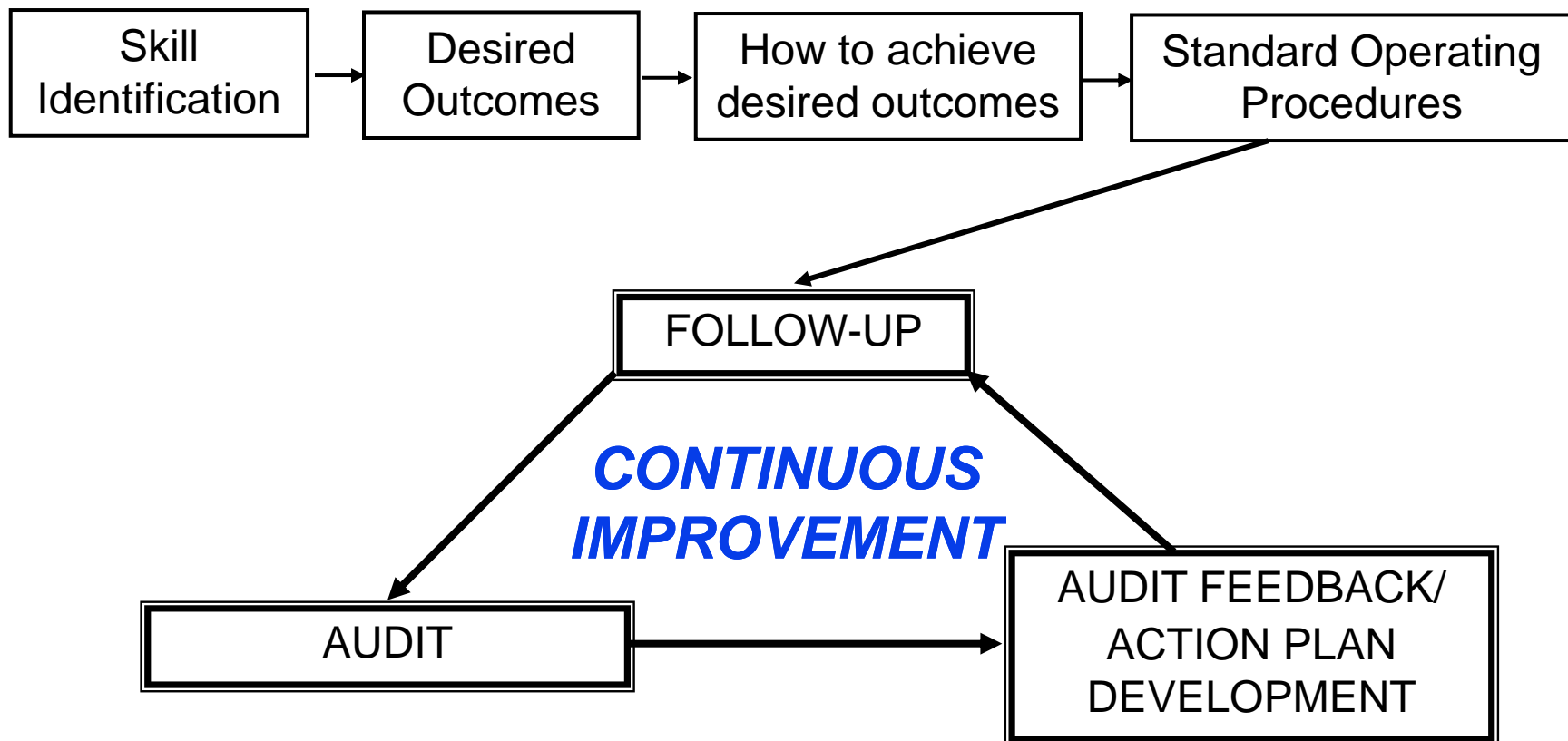
Ask "why"?
Develop Action Plan:
Define issues/reasons for deficiency
Create action register
Follow up on results

STEP 5: UTILIZING THE AUDIT PROCESS (continued)

Action Register

Action	Who	Target Date	Complete Date	Comments

STEP 6: CREATING CONTINUOUS IMPROVEMENT



STEP 6: (continued) ***CREATING CONTINUOUS IMPROVEMENT***

TRAINING PROCESSES CAN PROVIDE EMPLOYEES WITH EXCELLENT INFORMATION. THE KEYS TO MAKING THIS INFORMATION WORK FOR YOUR ORGANIZATION ARE:



TRAINING AND DEVELOPMENT ROADMAP



DEFINED, DOCUMENTED TRAINING OUTCOMES TO SUPPORT THE ROADMAP



DEVELOPMENT OF INDIVIDUAL AND TEAM SOP'S TO SUPPORT ROADMAP OUTCOMES



PROFICIENCY AUDITS



COMMUNICATION



ACTION PLAN DEVELOPMENT



FOLLOW THROUGH

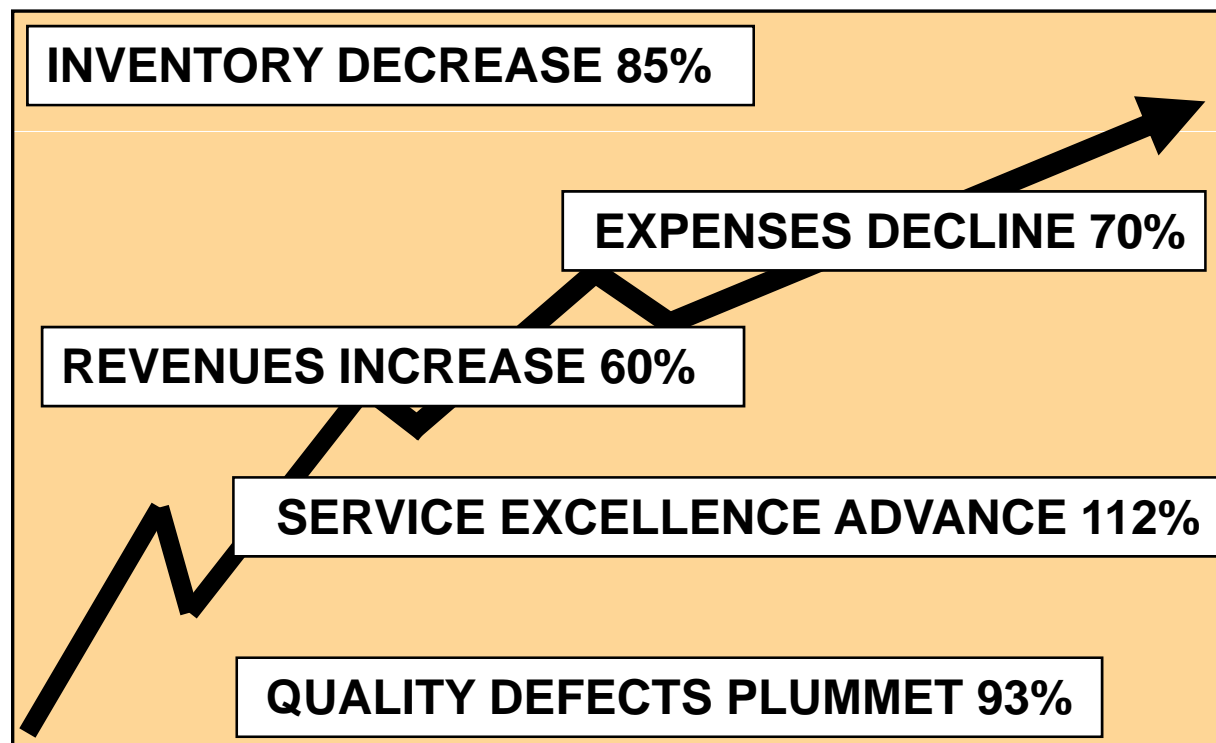


RECOGNITION



STEP 6: (continued) ***CREATING CONTINUOUS IMPROVEMENT***

***WITH AN EFFECTIVE AUDIT PROCESS, TRAINING PROCESSES
PROMOTE BOTTOM-LINE BUSINESS IMPROVEMENTS.***



QUANTUM LEAPS IN BOTTOM-LINE RESULTS

Training Initiative Requirements...

- Creation of a visible and auditable operating system that gives employees the consistency, connectivity, and clarity they need to advance the business
- Creation of a operating system that enables leaders to measure engagement and business performance improvement through common processes
- Creation of a process-driven system that in essence becomes, *“How we do business”*
- Creation of a rigorous and dynamic system that gives leaders at all levels confidence in their ability execute strategy through tactical processes that insure:
 - A sense of urgency within the organization
 - A clear and concise business focus throughout the organization
 - Shared accountability driven consistently throughout the organization