

Training and Certifying On-the-Job Trainers

Many organizations don't train their experts how to teach—that is, how to be on-the-job trainers. Here's how to make sure your SMEs have the "right stuff."

To stay ahead of their competition, companies must increase flexibility, use advanced technologies, and increase their responsiveness to customers' needs. An efficient on-the-job training (OJT) program is critical for developing the highly skilled employees needed for a business's success in these areas.

Traditionally, OJT has been delivered by supervisors or front-line employees. Although few trainers receive enough preparation, increasing numbers of companies are recognizing that they must carefully select and train their on-the-job trainers. Some organizations also are recognizing that on-the-job trainers need to be certified and held accountable to certain standards.

The advantages of certifying on-the-job trainers include the assurance of standardization and consistency of training, the guarantee that trainers will possess up-to-date knowledge and skills in the tasks they teach, and the opportunity for trainers to continually improve their knowledge and skills.

On-the-Job Trainer Selection

Since specific tasks are taught through OJT, on-the-job trainers can be selected

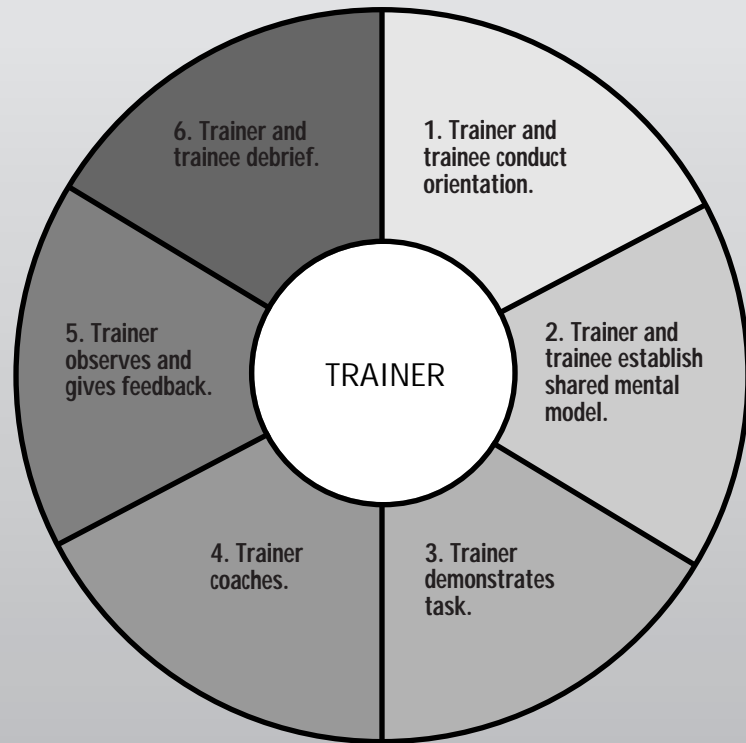
from a much larger pool of people than might be the case for other types of training. But much of the success of OJT depends on trainers having the "right stuff." Many organizations make the mistake of selecting on-the-job trainers based solely on seniority or job-task experience. Employees who train must be experts in the tasks they are teaching and have good communication skills. Moreover, they must have patience and respect differences in learning abilities. And they also must *want* to be trainers.

On-the-job trainers may be selected in a variety of ways. For example, supervisors and peer groups from each job area might nominate people they think would be good trainers. The nominees who wanted to be on-the-job trainers might then be interviewed by a committee of human resources professionals who would explain the responsibilities involved in OJT. Or, as a Portland-based metal castings producer has done, notices announcing the need for on-the-job trainers and requests for volunteers could be posted. Volunteers would then be given a test to identify communication and interpersonal skills before attending interviews with area managers and human resources personnel.

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Six-Step OJT Cycle



Ultimately, whatever method is used, those who select on-the-job trainers need to consider the candidate's

- ▼ technical experience
- ▼ training knowledge and experience with the specific training modules the trainer will teach
- ▼ job-task knowledge
- ▼ interpersonal skills
- ▼ attitude
- ▼ listening ability
- ▼ degree of patience
- ▼ regular work hours (should be on duty during the time period that training is scheduled)
- ▼ accessibility
- ▼ interest in training
- ▼ communication skills
- ▼ willingness to share
- ▼ respect from peers
- ▼ willingness to follow certification guidelines.

Interviews with the candidates, their peers, and supervisors should be conducted, or references for each candidate should be obtained. Also helpful: administer personal styles tests to evaluate the candidate's skills in such areas as leadership and communication, or simulate training situations in which the candidate's performance may be observed.

Six Steps for OJT

The six-step OJT cycle (see figure, above) provides trainers with a simple, yet powerful, training methodology. The model has a dual purpose: It provides a method for systematically training on-the-job trainers, and it provides a methodology for new on-the-job trainers to use when delivering their own OJT. Use of this training cycle assumes the presence of a structured OJT program, including written training materials and clearly defined, measurable performance objectives.

Candidates practice each step in the training cycle, playing the roles of both trainer and trainee. Trainers need to experience the trainee's point-of-view—one of the most important assets trainers can have is the ability to empathize with the trainees. Trainers also need to understand the self-directed nature of the trainee's role: Since they know exactly what is

expected of them in terms of tasks and task performance, trainees have considerable control over their own training.

Step 1: Conduct an orientation. Before training begins, the trainer and trainee meet to discuss the requirements of the OJT program. Meeting materials include a training schedule, a performance appraisal form, and a description of each training module that the trainee will complete. Each training module's description should include the specific performance objective to be accomplished, any special requirements for the training session (e.g., equipment usage, safety glasses), trainer preparation, and—step-by-step—the procedure that will be followed during the training session. At the end of the orientation, both trainer and trainee agree on the training program.

Step 2: Establish a shared mental model. The trainer and trainee must be in agreement on the training and how it will be conducted. In a shared mental model, the trainer establishes rapport with the trainee, thereby reducing anxiety and increasing learning ability.

This is a good time to apply the knowledge of the trainer's and trainee's behav-

ioral styles. For example, pairing a trainee who likes structure and detail with a trainer who values these same traits may help eliminate style differences and their potential negative effects on the training. There are many off-the-shelf instruments that can provide insight on individual personality and style.

Also during this step, the trainer and trainee align their goals by reviewing the specific task to be taught and the steps of the training cycle that will follow. This provides a good opportunity to verify that the trainee has the necessary skills, knowledge, and experience to begin the training.

Step 3: Demonstrate the task. Once rapport is established, the trainer demonstrates the task to the trainee while the trainee observes. It is important for the trainee to understand the purpose of the task, why it is important, and how the task relates to the entire job.

During the demonstration, both trainer and trainee should refer to the training module, following it step-by-step. The trainer explains each step and includes any safety and quality points along the way. At this point, it's the trainee's responsibility

Sample Course Outline

Phase 1:

1. Structured OJT versus other types of training
2. Philosophy and basic components of structured OJT
 - a. five basic assumptions of human behavior
 - b. task analysis, performance objectives, module writing
 - c. job instruction, training techniques
3. On-the-job trainer characteristics
4. Trainer and trainee roles and responsibilities
5. Adult behavioral and learning styles
6. Factors that interfere with OJT and what to do about them
7. Assessing prior skills, knowledge, and experience of trainees
8. The six-step OJT training cycle
9. Applying adult behavioral and learning styles to the six-step OJT cycle
10. Performance appraisal and documentation
11. Introduction to the OJT Trainer Councils

Phase 2:

Hands-on application of the six-step OJT cycle

to ensure his or her own understanding of each step by asking pertinent questions.

When the task demonstration is completed, the trainer summarizes the task and encourages the trainee to ask questions. The trainer also should connect the task completed to both previous and future tasks.

Step 4: Coach the trainee. Again referring to the training module, the trainee should perform the task again, receiving assistance from the trainer as necessary. The trainer asks the trainee to explain the purpose of the task and its

importance, to explain each step as it is performed, and to include safety and quality issues. The trainer coaches the trainee by encouraging questions from the trainee and offering alternative ways to approach the task when necessary. Once the trainee has finished performing the task, he or she should summarize the task to verify understanding of each step.

During this step, trainers must create and maintain an atmosphere of equality with the trainee—not in the sense of skill, knowledge, or experience, but in terms of respect and dignity. At no time should the trainer be in a superior role.

Step 5: Observe and provide feedback. After the trainer provides a demonstration and coaching, the trainee probably is ready to perform the task without assistance—but the trainer should verify this with the trainee just to make sure. The trainee should perform the task step-by-step, explaining each step as it is performed along with safety and quality points. The trainer should refrain from giving any feedback until the task is completed, unless the trainee's performance is likely to involve harmful consequences. Before giving feedback, the trainee assesses his or her own performance.

Feedback should be gentle, specific, and descriptive rather than evaluative. At the end of this step, the trainer and trainee discuss when to conduct a performance evaluation on the task.

Step 6: Debrief the trainee. During this step, the trainer provides a summary of the task. Safety and quality points are noted again in order to assure understanding. The trainer ensures that the trainee understands how the task relates to previous and future tasks and checks the trainee's understanding of the sequence of steps. At the end of the debrief, trainer and trainee schedule a performance evaluation or set up practice times. Any questions the trainee may have are covered.

The debrief is immediately followed by a self-critique of the training session, using a performance evaluation checklist for both trainer and trainee.

Following the six-step OJT cycle will save time, avoid the need for retraining, and reduce the number of trainee errors. Using the six-step cycle guarantees that for every task trained, trainees can:

- ▼ explain the purpose of the task and how it relates to the entire job
- ▼ explain any safety precautions and quality points
- ▼ perform the actions step-by-step and explain what they are doing and why
- ▼ check their work against the standard.

Certification

Often on-the-job trainers receive no training at all—and the few that do receive no more than a single course on training techniques. This “one-shot” approach is not enough to ensure that the on-the-job trainer can provide reliable OJT. An on-the-job trainer certification process ensures that the trainer practices a structured training delivery method, and that a continuous improvement cycle that keeps trainers' qualifications up-to-date is implemented.

Incentives for on-the-job trainers to achieve certification include career or job enhancement and recognition for professional competence. Certification should facilitate the employees' achievement of their personal goals in conjunction with corporate goals.

Certified on-the-job trainers must be adept in planning, conducting, and evaluating OJT. The certification process should include three phases: awareness, practice and feedback, and reinforcement. Both the awareness and the practice and feedback phases can be covered in a two- or three-day train-the-trainer course (see sidebar, left, for sample outline). The reinforcement phase occurs after certification.

Phase 1: Awareness. In this phase, the trainer candidate learns about such subjects as the basic philosophies and techniques of training, adult learning styles, and trainer and trainee roles and responsibilities.

Phase 2: Practice and feedback. This phase provides trainers with the skills needed to actually deliver training to others. Each trainer candidate practices three roles: trainer, trainee, and observer. Using the six-step cycle, trainers practice in groups of three, rotating through the roles.

At first, each step of the cycle is practiced separately. Then, when each of the six steps have been performed once, the group practices delivering an actual train-

Sample Trainer Certification Guidelines

Prerequisites:

1. At least one year's experience working in the job-task area
2. Commitment to all three phases of the certification process
3. Successful completion of all phases of a train-the-trainer course
4. Experience in, or current involvement in, writing training materials

On-the-Job Trainer Certification Requirements:

1. Meet above prerequisites.
2. Successfully complete OJT for trainees.
3. Successfully attain required level of competency by demonstrating:
 - ▼ effectiveness in giving feedback and

using coaching strategies

- ▼ skills in verbal and nonverbal communication
 - ▼ flexibility in adapting to the needs of trainees with different backgrounds, skills, and abilities
 - ▼ skill in organizational and time management
 - ▼ credibility with peers through expertise and professionalism
 - ▼ ability to conduct task analyses, write measurable and observable performance objectives, and prepare effective training materials
 - ▼ skill in evaluating trainee performance.
4. Possess hands-on experience performing all tasks that will be taught.

- ▼ provide orientation to new trainees
- ▼ review and document performance measurements
- ▼ provide a sounding board for trainee issues and concerns
- ▼ help select future on-the-job trainers
- ▼ seek ways to continually improve their technical knowledge and professional competence to maintain their certification.

Following successful completion of the awareness phase, the practice and feedback phase, and the OJT requirements, candidates may be certified as on-the-job trainers if they attain the required level of competency (see sidebar, left, for guidelines for OJT trainer certification, including competencies). ■

ing module. A videotape of each trainer's performance is made for subsequent critiquing.

After the train-the-trainer course has been completed, the trainer candidates practice OJT for two to three months. During this period, each trainer candidate conducts a minimum of 10 actual training sessions with trainees. At least five of these sessions are observed and evaluated by certified in-house trainers.

Phase 3: Reinforcement. The third phase is critical to maintaining and improving the trainer's performance over time and is required to maintain certification status. This phase involves the establishment of ongoing OJT Trainer Councils—groups of three or more certified on-the-job trainers. Members of the OJT Trainer Councils meet at least once per month to

- ▼ set requirements for and monitor the in-house OJT trainer certification program
- ▼ provide continuous improvement of the entire OJT process
- ▼ assess the effectiveness of the OJT system and pinpoint where additional work is needed
- ▼ share training issues and concerns with other on-the-job trainers and solve problems
- ▼ meet with trainees, peers, and supervisors to gather important feedback
- ▼ observe each other during delivery of OJT and provide session evaluations in order to achieve inter-rater reliability among

trainers (Inter-rater reliability implies that (1) two or more trainers would evaluate the same performance in the same way, and (2) the same trainer would evaluate similar performances of different trainees in the same way.)

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