TRAINING

Chicagoland Chapter

ASTD
Linking People,
Learning & Performance

SPRING 2006

T O D A Y

A MAGAZINE FOR WORKPLACE LEARNING AND
PERFORMANCE PROFESSIONALS IN THE CHICAGOLAND AREA

Letter from the Editor

FOCUS ON PERFORMANCE MANAGEMENT

This issue of Training Today provides a variety of perspectives on the important process of workplace performance management. Barry Altland, the facilitator of our workshops in April, shares more words of wisdom about Workplace Learning and Performance and Performance Management in the first article.

The next article on performance management is the story of a student project that became a real-life solution for The Chicago School of Professional Psychology. By all accounts, the effort was a win-win solution.

Next, Ken Phillips supports his claim that Performance Management differs from "Performance Appraisal" and "Management by Objectives" in two important ways: it is formal and aligned with the corporate strategy.

In the third article, Barry Wisdom gives us an entertaining, and all too real, story of a CEO on a journey with his co-workers in the company van. It is a graphic example of the importance that information plays in performance management.

In the following article, a former Marine Corps instructor, Joseph Gilkerson, shows us that, although business and military organizations have very different fields of operation, there are many similarities in their approach to performance management. Take notice of how much time Mr. Gilkerson spent monitoring the performance of his direct reports; it might surprise you.

The issue concludes with a "Counterpoint" to Micki Lewis' comments in the Winter issue of Training Today. In Micki's article, "Elevating Our Profession: CCASTD is Leading the Way!" she suggested that the community reconsider the use of "Training" to describe the profession. In keeping with the terminology used in the CCASTD annual report, she suggested replacing Training with Workplace Learning and Performance. In this issue you will see that at least one of our readers disagrees. Consider Candace Zacher's position in Counterpoint and decide where you stand on the issue.

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Before you dig into this issue, I want to remind you that the Winter issue of Training Today included a challenge to find a new name for the publication. I received only a single email! Does that mean most of you don't mind the Training Today moniker? I'll keep the email lines open a bit longer… let me know what you think!

2006 is a year of change for CCASTD, and the trend includes Training Today. Our new management company, W.J. Weiser & Associates, Inc., designed this issue and will continue to do so. Many thanks to Kelly Cushing for her assistance.

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June 21, 2006

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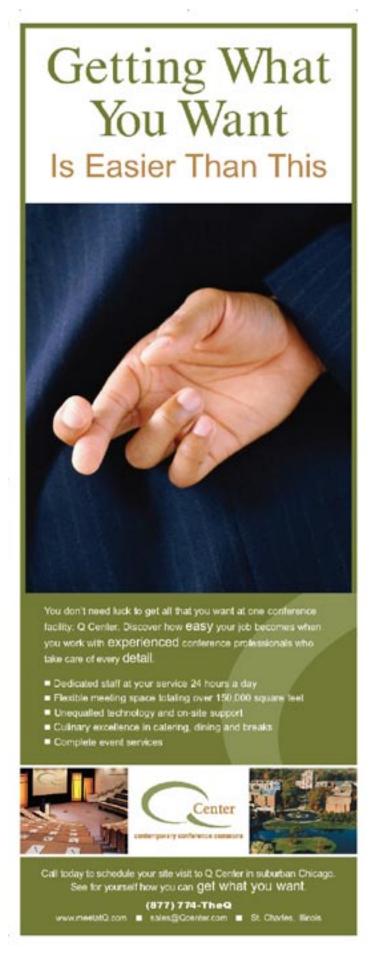
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Interview with Barry E. Altland

TT: In your workshops for CCASTD you refer to a PM Cycle. How is this different from a traditional Performance Appraisal system?

Mr. Altland: Performance reviews, appraisals, evaluations, whatever your clients call them, are just one part of the overall PM cycle. The PM cycle guides an employee's existence in an organization from the talent acquisition phase through ongoing learning and development and into performance reviews for rewards, recognition, and succession planning.

The PM cycle is the never-ending loop, or thread, that ensures that there is alignment between all the elements inherent to sustaining individual and organizational performance success. We looked at this in depth during the April workshops, and the PowerPoint is available on the CCASTD website. Also, feel free to contact me at Barry.Altland@ginncompany.com, and we can share ideas.

TT: With respect to Performance Management, what are a few of the most important things for managers to know?

Mr. Altland: Leaders need to know that PM is not about the process; it's about the people. In addition, operational leaders, regardless of the industry, must know that managing the performance at the individual, team, department, division, and company-wide level is not an HR initiative, but one that must be owned and driven by the operational leaders themselves.

TT: It appears that, like many of us, Workplace Learning and Performance (WLP) "found you" instead of the other way around. Can you tell us something about how and why you made the shift from management to WLP?

Mr. Altland: Over seven years ago, the Learning & Performance team at Universal Orlando Resort (the theme park organization) was looking for a person with operational and leadership experience who also felt comfortable speaking in front of a room full of people. Since I valued learning and growth, and had a bent toward training even as an operational leader, I was given this grand opportunity to expand my career horizon under the same company umbrella. I quickly learned, however, that workplace learning is not a whimsical pursuit; it is a profession with a strategic purpose. And, I learned that adult learning was so much more than just talking at people.

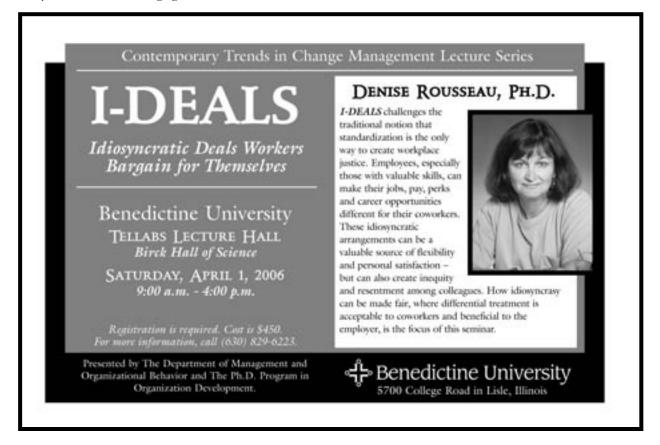TT: How did you prepare yourself for this new role?

Mr. Altland: The three best things I did to prepare myself for this career transition were: joining the local chapter of ASTD, reading voraciously, and studying the art of facilitation.

TT: What kinds of WLP programs do you offer your company?

Mr. Altland: In the last year, I completed a full program of Workplace Integrity, a learning event focused on harassment and diversity issues. In addition, we just launched an entirely new Employee Performance Review initiative and we are in the process of developing a line of leadership development programs and learning sessions for hourly employees. All of these programs are aligned to our company's core values, which we call the Ginn Attributes: Teamwork, Innovation, Ownership, and Flexibility.

TT: How large is your training organization?

Mr. Altland: A trick question! The way I see it, every leader and every employee is a contributor every day to our learning organization. My role is merely to provide tools, resources, knowledge, and vision to

ensure that what is being learned supports the company direction.

TT: How would you describe the role of a WLP Professional in today's workplace?

Mr. Altland: I place everything I do in terms of "employee engagement." I describe what we do in WLP as part of creating the "mutual admiration society" between the employee and the company. It may seem crazy to talk about concepts such as "love" and "admiration" in the work world, but there is a real emotion to what we do.

When an organization invests in an individual's development, it makes the individual feel cared about and valued; that in turn makes him or her want to stay longer. Engagement equals retention, and with the Central Florida job market currently at 3% unemployment, taking care of the "good ones" you have is going to be increasingly more important to the business success of an organization.

TT: What is your relationship with the CEO and other members of the executive team?

Mr. Altland: I am blessed that the CEO has his office right across the hall from me so I have immediate access to him. In addition, I have been fortunate to develop a strong relationship with a number of key executives, and I leverage that when necessary.
Being able to connect with your executive leadership at a different level besides just selling your value as a WLP professional can be advantageous. Join the softball team, go to the after hours outing, participate in the community service event of his/her choice, find out about what matters to him/her on a personal level. Catch them at a moment when they are just being a person, and capitalize on it by being a person with them. Many of you are closer to having your "seat at the table" than you might realize—act that way. Tone down the reverence, and focus on building a human relationship.

TT: Can you identify one or two of the major challenges facing business organizations today and describe how training can help address them?

Mr. Altland: My experience says that most businesses face, at some time, a shortage of people talent. Clearly, WLP can have an impact on this issue. Learning initiatives are not just about knowledge and skill growth, but run much deeper than that. Help your participants understand that learning is not something that takes them away from their job, but rather is something that is part of their job. Tell them how fortunate they are that they work for a company that invests in their growth. Don't be afraid to put that

out there. People naturally want to feel that somebody cares, especially in their place of work, and you as the WLP professional can make that come alive for them.

TT: What do you think are the toughest challenges facing the corporate training professional today and what is some advice on dealing with these challenges?

Mr. Altland: The most difficult challenge facing a learning professional today is making the transition from a stand-up trainer to a fully functioning, and highly effective, performance strategist. Then, after figuring that out, the challenge is proving the need for this skill to your organization. Getting your employees and operational leadership to understand what you do and the difference you make is the next critical step. And that step never ends. Business acumen and relationship-building are the keys to keeping it moving. Know the business, know the people, and the rest follows.

TT: What advice would you give to a person who is new to the WLP profession?

Mr. Altland: First, learn the lexicon. Stop calling yourself a "trainer." Stop calling what you do "training." I use the terms "Employee Engagement Strategist" or "Learning Professional" when I explain to others what I do. And then, I follow up with a brief definition—the what's and the why's. I have found it amazing how others remember this! My own peers are quite vocal about saying, "I know you don't like being called a trainer." Training has gone the way of "waitress" and "stewardess." Brand what you do. Elevate it to the level it deserves.
Second, market the value to your clients and employees relentlessly. Learning is a nebulous thing at times, and it is often taken for granted. How many of us have a means to clean our clothing? A washer and dryer in your home, possibly? Ever had your washing machine break? How quickly did you realize the impact of its absence? So it goes with learning in the workplace. Your people may not always fully appreciate it when it's there, and may only miss it when they realize they are not growing. By then, they may be ready to move on. Before they get there, remind them of just how important what you bring to them is.

TT: Any final thoughts on WLP or PM?

Mr. Altland: Model the profession every day. Never stop learning. Read, study, observe, discuss, listen, challenge, develop, and grow. Sprinkle your professional and personal life with open-ended questions, needs assessments, and continuous improvement at every turn. Be the living example of what our profession espouses. You will see, as others see you living this enriched life, how contagious it can be.

Barry E. Altland is a seasoned operational leader who transitioned into the profession of workplace learning, organizational development, and employee engagement over seven years ago. During this time, Barry has facilitated to thousands of employees in his former role with Universal Orlando Resort on topics ranging from team member on-boarding, guest service, leadership, and regulatory and safety programs.

Barry's next assignment was to drive all learning and organizational development initiatives at Ginn Clubs & Resorts, a real estate development and hospitality company started in 1998. Mr. Altland is currently the Corporate Training Manager for Signature Flight Support in Orlando, Florida. He is also the 2006 Chapter President for the Central Florida Chapter of ASTD. He can be reached at barry.atland@signatureflight.com.

Performance Development System at The Chicago School of Professional Psychology: Student Project Becomes a Real-Life Solution

by Amanda Tinsley

The Challenge of Growth

Over the past three years, The Chicago School of Professional Psychology has experienced tremendous growth. This has brought about the need for new positions, structures, processes, and methods within the organization. Faced with these challenges, the constituents of the school have identified an aggressive five-year plan that includes becoming "School of Choice" in professional psychology and "Employer of Choice" in higher education. This will be accomplished by exemplifying best-practices with regard to educational offerings and people-practices when compared to similar institutions.

As the Director of Human Resources, it has been my responsibility to quickly put into place the tools, methods, and processes that will help us obtain these two objectives. Working with the other constituents, we decided to focus on employees and needed a way to grow and develop them to achieve the goals of the strategic plan. As a result, I needed to design a system that would emphasize the development of staff, faculty, student workers, and the Executive Cabinet (the President and Vice Presidents.) We chose Performance Appraisals as a method for achieving these goals.

I also realized that the new system would need to align with The Chicago School's distinctive mission:

"Integrating theory, professional practice, and innovation, The Chicago School of Professional Psychology provides excellent education for careers in psychology and related behavioral and health sciences. The school is committed to service and embraces the diverse community of our society."

Reflecting the systematic integration of our mission, our logo symbolizes:

- s Education
- s Innovation
- s Service
- s Community

In order to be consistent with this statement, the system would have to focus on education, innovation, service, and community.

A Unique Opportunity

As I was preparing for this effort last January, I was approached by a second-year Industrial/Organizational Psychology (I/O) master's student, Andrea Bidlack, regarding a semester project in the Performance

Appraisal (PA) class. The project was to develop a comprehensive PA tool utilizing the knowledge learned throughout the I/O program and in particular gained in the PA class.

At this time, a second student, Ben Rottschafer, also approached me about the project. As the three of us talked, we realized that we could combine the students' project with the school's need for a PA system. We also realized that we would need a larger group of students to accomplish a high quality result and, thus, additional students could be involved.

My roles in this project are to mentor, coach, and develop the nine-member team of I/O master's students and to ensure a high quality result. We created a Project Lead position, held by Ben, which streamlined communication and created an additional level of leadership development. I was able to coach and develop Ben in his role as team leader and, in turn, he had the opportunity to coach and develop the other team members. He also gained experience in project management.

The System

One of the first steps in the development of the PA system was to determine if it would be used for development, evaluation, or both. Frequently, a PA is used strictly to determine merit increases and bonuses. In fact, Performance Appraisals are often looked upon as routine or disciplinary rather than as part of a thoughtful and consistent process to develop employees. At times, performance issues may not be addressed at all. I know from personal experience that this kind of passive approach deprives the individual of the opportunity to perform well and prevents the organization from achieving its goals.

To avoid this mistake, we wanted to ensure that the system we created included the tools to coach and develop employees year round; we wanted it to include a complete Performance Development System (PDS.) Using key words from our mission and strategic plan, we developed six core competencies for employees — Professionalism, Community, Education, Innovation, Service, and Diversity.

Each core competency is described by several performance indicators and behavioral expectations. The Executive Cabinet, staff, faculty, and student workers will be held accountable to these indicators and behaviors, which ensures that expectations are known at all levels as we strengthen the sense of community and strive to achieve the goals in the school's strategic plan.

In order for us to ensure that the system would be used as a development tool, we customized performance indicators and behavioral expectations for every position.

To do this appropriately, accurate job descriptions were necessary. The team scheduled interviews with all employees to discuss their specific job duties and responsibilities, and the skills needed to perform them. Then, a job description was developed as was a section on the PA form containing department specific expectations.

We also wanted to make sure that the PDS focused on employee development from the date of hire. Thus, when a new employee is hired, he or she will receive a packet, which includes the job description, and a coaching guide that mirrors the PA form. At orientation, the performance indicators and behavioral expectations of that position will be explained.

The employee will then receive a review at 45 days and again at 90 days. As a behavior occurs that needs improvement, the supervisor will utilize a coaching guide to frame the developmental conversation.

After the first few months, employee performance will be rated and discussed once a year. The employee will be asked to complete a self-appraisal to prepare for the meeting with his or her supervisor. The supervisor will complete an identical appraisal on the employee. To make sure that the employee is aware of, and prepared for, what is being reviewed, we created documents that support one another.

At the time of the review, a rating discussion will take place between the supervisor and employee focusing on performance strengths and development opportunities. In addition, resources will be identified, such as training sessions, which can be used to help in the development process.

On-going Commitment

The team is preparing to present their final project in class on April 24, 2006; I will be present as their client. At that time, their responsibility to the project will cease. However, the team members are aware that training will be required for all employees as we implement the new PDS system and many of them have expressed interest in remaining engaged with the project. I am looking forward to working with them to develop and implement training for the employees of the school.

Value to Participants

Ben has expressed true appreciation regarding his role as the Project Lead in the development of the PA system. He says, "Having worked with many of the team members before, this was a great opportunity to align everyone's individual strengths to the project demands… As a leader, I have gained phenomenal experience in empowering each team member and allowing individual ideas to be incorporated into the project. By

supporting the team's ideas, their increased commitment and dedication truly shined and made this project possible."

Andrea Bidlack, who initiated this project, stated, "I've learned that creating a new performance appraisal from scratch is an arduous process. It takes a lot of background information about the organization – such as the mission, values, and strategic plan – in order to create competencies that will align employees' behavioral expectations with these foundations of the organization. I liked having a real experience to learn from in the classroom as opposed to a fictional company to work with… We had a chance to understand what it is like to try and please a client who may or may not agree with our ideas and if they didn't, to change our approach."

As the client of this project, I am pleased with the product that has been produced. I am very excited about implementing this PDS because it clearly defines each individual's role within our institution and places emphasis on professional development. This system also provides a more clearly defined document that supervisors may use to develop their staff.

As the Director of HR, I am extremely pleased with the opportunity to further develop my knowledge and leadership skills by managing this project and team. I am also thrilled that I was able to reinforce the education at The Chicago School by creating a situation where innovative methods of providing a real-life experience are used. I am confident that all parties involved gained valuable experience and practical knowledge that will be utilized in the professional world.

So, anyone need a good I/O Psychologist? I have a few that I could recommend… namely Andrea Bidlack, Regina DiLauro, Chelsea Hart, Manika Herring, Colleen Kelley, Elizabeth Mitchell, Jacob Nuber, Ben Rottschafer, and Candice Schlein.

Amanda Tinsley is the Director of Human Resources and is currently pursuing a master's degree in Industrial/Organizational Psychology at The Chicago School of Professional Psychology.

Performance Management: Not Just Another Pretty Name

by Ken Phillips

What is employee performance management, anyway? Some people think it is another name for performance appraisal. Others think it is the monitoring of a product or service produced or offered by a department or team. Still others think it is another name for management by objectives (MBO).

The truth is that employee performance management is none of these, but includes all of them. Employee performance management is the art and science of linking together individual employee performance efforts with company strategy. Or, put another way, employee performance management makes achieving company strategy everyone's everyday job. At a minimum, employee performance management consists of four key activities: clarifying expectations, giving and receiving feedback, coaching, and conducting

performance appraisal meetings. A model of the process might look something like this:
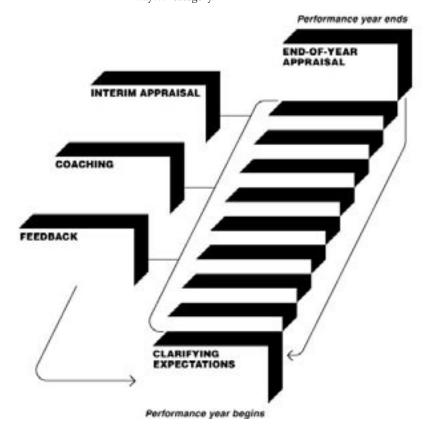
As you look at the model, you're probably thinking, "This looks like a lot of models of performance appraisal and management by objectives that I've seen" and you would be right. These same four activities are often included as elements in performance appraisal and MBO systems as well, but true performance management has two key differences.

First, true employee management systems, through one means or another, attempt to formalize the feedback and coaching activities in the model above so that they become an integral part of managing employee performance. In contrast, performance appraisal and MBO systems typically group these two activities under the "Oh, and by the way…" category.

For example, "Oh, and by the way, in addition to clarifying expectations and conducting performance appraisal discussions, you also should provide your employees with feedback and coaching throughout the performance year." Relegating the feedback and coaching activities to the "Oh, and by the way" category virtually guarantees that they won't be done except by a few truly exceptional managers.

True employee performance management systems attempt to address this flaw by formalizing the feedback and coaching activities so that they are performed on a regular basis by all managers, not just the exceptional few. The premise behind formalizing these activities is based on the fact that "what gets inspected, gets respected." In other words, focusing attention on whether or not managers perform the two activities and how well they perform them,

Employee Performance Management Model

increases the likelihood that all managers will engage in feedback and coaching, not just the exceptional few.

While there isn't one best way to formalize the feedback and coaching activities, approaches that an organization might use include:

• Require interim appraisals – add required interim appraisals (monthly, quarterly, or semi-annually) to the activities comprising the employee performance management process. This forces managers to hold multiple performance related discussions with employees during the performance year and provides multiple opportunities to give employees performance feedback and to coach them on how to improve their future performance.• Use upward appraisals – have employees evaluate their managers on how well the managers perform the key activities comprising the employee performance management process.

• Implement a multi-rater assessment process – require managers to participate in a regular (12 to 18 month) multi-rater assessment process that includes items on how well the manager performs the key activities comprising the employee performance management process.
• Conduct an annual organization survey – conduct an annual organization survey that, among other things, captures data on how well an organization's managers perform the key activities comprising the employee performance management process, and provide this feedback to all organization members.

Second, true employee performance management systems try to align individual employee performance objectives with company strategic initiatives and goals. While all organizations would like employee performance objectives aligned with company strategic initiatives and goals, companies with true employee performance management systems take steps to ensure that this happens. Without ensuring this alignment, organizations run the risk that employees will develop individual performance objectives that aren't in sync with their job's current demands and priorities. They may focus on either what they are most comfortable doing or what they've done in the past – neither of which may be right for the current situation.

Again, there isn't one best way to create this alignment. However, two approaches organizations can use are:

1. Implement a focal point employee performance management system – employee performance management systems, and performance appraisal and management by objectives systems for that matter, can be scheduled according to either a focal point or anniversary date. Anniversary date systems, which are the most common, require managers to conduct objective setting and performance appraisal

activities throughout the year to coincide with anniversary date (hiring or promotion) of employees. A focal point system, on the other hand, requires managers to conduct all objective setting and performance appraisal activities at two specific times during the year – sandwiched around either side of the organization's business planning and budgeting processes. Using a focal point employee performance management system enables managers to have both a better idea of how each employee's performance efforts contributed to organizational success as well as what individual performance objectives employees should focus on for the upcoming year in order to help the organization achieve its strategic initiatives and goals.

2. Adopt an electronic strategy execution system – while relatively new, software programs now exist to help organizations better align individual employee performance efforts with company strategic initiatives and goals. At the heart of these systems is a computer screen, called a goal card, which lists in order from left to right: organizational strategic initiatives, current organizational goals, division or department goals (if applicable) and a field for employees to record their individual performance objectives and any milestones associated with the objectives. The value of the goal card is that when employees sit with their manager to develop and record their individual performance objectives, all the information they need to ensure

alignment between their individual performance objectives and company strategic initiatives and goals is displayed in front of them on one screen.

In summary, true employee performance management systems are not just performance appraisal or management by objectives. Nor are they merely the monitoring of a product or service produced or offered by a department team. True employee performance management systems are characterized by two clearly identifiable elements: 1) through some means, they attempt to formalize the feedback and coaching activities comprising the managing employee performance process; and 2) they take concrete steps to ensure that individual employee performance objectives are aligned with company strategic initiatives and goals. Without both of these elements, what an organization might be calling an employee performance management system is nothing more than a performance appraisal or management by objectives system masquerading as employee performance management.

Ken Phillips is president of Phillips Associates and a consultant in the areas of employee development, management/ organizational development, and sales training. Phillips Associates offers integrated performance management and sales performance training programs emphasizing skill building.

Lost on the Road to Empowerment: Does Anyone Know Where We Are Going or How To Get There?

by Barry L. Wisdom, Ph.D.

The Scenario

Promptly at 9:00 on Monday morning, the Chief Executive Officer of Anycorp directed his administrative assistant to make a number of calls. As a result, the vice-president, a department head, a supervisor, and a first-line employee were summoned, without explanation, to meet the CEO in the parking lot. When all were accounted for, they were loaded into a company van and the CEO slid behind the wheel. After a brief greeting that provided no information as to the purpose or destination of the trip, the CEO started the van and the journey began. Picking his way through traffic, the CEO drove out of the city, through the suburbs, and onto the interstate.

Two hours after the start of the trip, the CEO, fatigued from a late night's work, pulled to the side of the road, slipped off his jacket, and crawled into the back of the van. Once settled, he directed his vice-president to take the wheel and then promptly fell into such a deep sleep that he could not be roused.

The Problem

What is the dilemma now facing these passengers and why is it analogous to the dynamics in many organizations today? Who is responsible? What does this story have to do with empowerment, training, and performance management? All of these questions invite an exploration into the state of many businesses as they charge into a new century.

The obvious problem facing the members of this organization is that they don't know where they are going or how to get there. The vice-president could take the wheel and resume the journey but she would do so with a great deal of uncertainty as to whether her choice of direction is the same as the one intended by her boss. From earlier discussions with her boss, she may be aware of the general orientation in which the CEO was leading the company, but she may still lack clarity as to the ultimate destination.

Back to the Scene

Rather than take the wheel immediately, and risk going in the wrong direction, the vice-president decides to discuss the matter with her fellow travelers. In huddled consultation with the remaining passengers over the rhythmic snoring of the CEO, the vice-president develops more insight into the problem now facing her and, by extension, her organization. In addition, the questions she asks reveal that the lower the employees are positioned within the organization's hierarchy, the less equipped they are to resolve the company's travel problem.

The department head proves to be bright and well informed in his respective area of concern (purchasing), and he has a lot of expert advice to offer on how to buy gas at the best price, get quantity discounts for meals, and find the lowest cost lodging. He is clueless, however, as to where they were headed.

The supervisor, accustomed to watching people perform prescribed tasks in a limited and specific context, is equally helpless outside of that defined, and now suddenly irrelevant, setting.

The first-line employee sits quite happily in his seat and awaits further directions as to what he should do. He is aware of a problem, but is comfortable in his belief that the problem was neither of his making nor his

responsibility to resolve.

Despite consultation with her fellow travelers, the vice-president is at a complete loss as to where to go next. The journey comes to a halt as she waits for the CEO to wake from his nap. The performance of the vice-president and the organization is virtually nil.

Who Is Responsible?

From the information provided in this scenario, it appears that the blame for the faltered journey should rest on management, and the CEO in particular. Presumably, the CEO knew where he wanted to go because he began the trip with a purpose. Unfortunately he failed to pass that information along to those he wished to take with him.

Few would disagree with the adage that information is power. Within an organizational context, knowing something that others do not creates a decided advantage. However, failure to share this information can also be a problem. Information is a tool. It is the key that employees can use to unlock countless mysteries and the substance from which they can craft solutions to problems. How information is distributed directly impacts the performance of almost any enterprise.

There are many different dynamics that could have taken place had the CEO communicated his vision in different ways. Let us examine some of them and the different consequences these methods might have produced.

Bits and Pieces

Before falling asleep, the CEO could have given specific instructions as to what his new driver was to have done such as, "Continue on this highway for another 50 miles and then head north on route 66 for 30 minutes."

This method would move the van down the road, but the riders would still have had a very limited sense of security as to the final destination and would have remained tethered to the boss if they encountered any problems. Again, they would waste time if the instructions were completed before the CEO woke up.

In a production setting, this approach would be analogous to giving the employees only one piece of the product to assemble at a time and having them report back when they were in need of the next piece. This would result in a grossly inefficient system that would promote short-term thinking and disengagement from the organization. It would also stifle initiative, creative thinking, and independence. It would leave employees feeling frustrated, captive, and bored. Their performance would be fair at best.

General Direction

As an alternative, before falling asleep, the CEO could have given the driver a general sense of where they were headed by saying something such as, "Take us to a large city to the northwest."

The employees would be a bit more productive because they would have a better idea of where to head. They would not be bound by limited and specific pieces of information, but rather would have a broader view of their task. They could make decisions regarding direction, mileage, and speed, but there would remain an uneasiness as to whether they are going toward the same city the CEO had in mind. They would also be unsure of precisely where to go in the city once they reached it.

Though this method of distributing information is more enriching than the ones mentioned above, it may promote conservative decision-making and limit the consideration of promising options. Under this system, employees will always wonder if they have gone too far, or not far enough, and the tendency will be to play it safe and avoid any departure from the status quo. Individual performance might be acceptable, but the organization's performance would be hampered.

Spot on the Map

Alternatively, the boss might have said, "Here is a map and this is the route to Chicago you should take to the final spot I have marked." This way of informing may present somewhat of a mixed bag for the employees. On the positive side, it does remove some uncertainty; the ultimate destination and route are well known. On the negative side, the employees are deprived of a role in the selection of the destination and the method of getting there. The whole process would not be theirs, but their boss. They would be relegated to a secondary rather than a primary role; they would be merely riders on someone else's journey.

In addition, with the boss's failure to provide a time constraint for the trip, the passengers might find an opportunity to exert some measure of control by stopping along the way at a point that interests them. Setting parameters too tightly may invite employees to look for loopholes in order to exert some measure of self-determination. Individual performance would depend largely on individual personalities and how easily they are distracted.

Final Destination

As a final scenario, the boss could have said something like, "We need to be in the corporate office in Chicago for a six o'clock dinner meeting."

Only with this information would the riders know the destination and purpose of their trip. Assuming the route is not defined for them, they would be empowered with an inviting challenge. They could monitor road signs, call on their previous travel experience, collect information from people along the road, and make use of countless assets that are available to travelers. They would be invited to create a path to the goal and thereby gain an ego involvement in the trip that they otherwise would not have had. Along with this autonomy would come a greater ownership of the consequences of decisions. There would be greater responsibility accepted for any mistakes and greater pride for successes. This approach invites collaboration and teamwork from all present and will produce a sense of identity and esprit de corps.

The final result could well be that the crew would develop a route to the destination that is faster, shorter, and better than the one that might have been proposed by the boss. Most likely, they would all arrive on time at the meeting in Chicago and everyone's performance would be viewed positively.

Lessons Learned From the Trip

An important job for CEOs and managers is to develop a vision of where they would like their organizations to go. There is also great merit in involving employees in the process of identifying and clarifying this vision to provide them some ownership of the process. How many people are involved, and how far down in the organization they go, is a decision each CEO or manager must make. However, the deeper and wider the representation of employees, the broader the acceptance may be.

As seen from the four different methods of information sharing, information can be a two edged sword. If too little of it is given, as with the "Bits and Pieces" or the "General Direction" approach, employees will feel more uncertainty and will be less able to use their resources. But, there is a downside of providing too much information as well, as in the "Spot on the Map" approach. This approach imposes directions that are too explicit and therefore robs employees of ownership.

Perhaps the best alternative is to provide a vision of the destination that is focused well enough for employees to see, yet open enough to significantly involve them in the development of the route and mode of travel. This allows employees to take the organization where everyone wants to go rather than forcing them to simply go along for the ride. This also introduces a platform for performance management where employees will more likely feel fairly evaluated on clear and accepted expectations.

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Performance Management

In the U.S. Marine Corps

by Joseph Gilkerson

The Performance Evaluation System

On 1 January 1999, the U.S. Marine Corps adopted the Performance Evaluation System (PES) for performance management E - 5's through Brigadier. General.[1] The PES is a detailed review that is organizationally driven rather than job specific; an infantryman gets the same review as a jet mechanic and the evaluation is based on the expectations for a particular rank.

The PES approach was taken because the common opinion was that the previous evaluation system had become inflated. Under the previous system, almost everyone was rated Excellent or Outstanding (the two highest marks) and the reporting senior commander did not need to justify the marks. He or she was only required to make narrative remarks.

To address grade inflation, the PES requires that the local commander make comments to support the Unsatisfactory and Outstanding marks. In addition, each PES report must be reviewed by the next higher commander who can either agree or disagree. The person being evaluated is also required to review the PES. If individuals do not agree with what is stated, they must send a written rebuttal to the headquarters of the Marine Corps, which reviews all rebuttals for decision.

With the new PES system, the names of everyone with the authority to review a Marine are entered into a database and his or her marks are weighted. This way, if a senior commander awards Outstanding marks consistently to their Marines, the marks will hold less weight than an Outstanding mark by a commander that consistently marks their Marines as Average. Similarly, in order to apply for a promotion, evaluations are given a score at Marine Corps headquarters.

The most significant result, in my opinion, from the implementation of PES is a change in the attitude of the Marines being reviewed from trying to "look good" to the search for quantifiable developmental challenges that can be substantiated. In addition, a more accurate and consistent evaluation has occurred and outstanding marks have become less frequent and more deserving.

A comprehensive PES manual is accessible to all Marines to make sure that everyone is familiar with the system.[2] In addition, there are specific classes taught at entry level Officer Training and for seasoned enlisted at the Non-Commissioned Officer (NCO) and the Staff Non-Commissioned Officer (SNCO) leadership schools.

Performance Goals

In order to prepare enlisted members and officers for success, the Marine Corps has fourteen Leadership Traits and ten Leadership Principles that everyone is taught at their respective entry-level school.

The fourteen Leadership Traits are: justice, judgment, dependability, initiative, decisiveness, tact, integrity, enthusiasm, bearing, unselfishness, courage, knowledge, loyalty, and endurance.

The ten Leadership Principles are: know yourself and seek improvement; be technically and tactically proficient; know your Marines and look out for their welfare; keep your Marines informed; set the example; ensure the task is understood, supervised, and accomplished; train your Marines as a team; make sound and timely decisions; develop a sense of responsibility among your subordinates; and employ your command in accordance with its capabilities.

All Marines must live up to these traits and principals, and are evaluated on how well they do so on their PES

Incentive Programs

Incentive programs are based mostly on the opportunity for meritorious or accelerated promotion. Incentive programs also include awards such as Marine of the Month, Non-Commissioned Officer of the Quarter, and others. Since the Marine Corps is inherently an environment of over-achieving and high-performance individuals, positive peer pressure has a major role in providing incentive as well.

Challenges Remain…

The toughest challenges in the implementation of the PES system are continuing to develop consistency in evaluating subordinates and finding the time to conduct follow-up counseling and mid-term reviews. Using PES, a sizable portion of a supervisor's time is spent on managing performance.[3]

Despite the challenges, if created and conducted properly, a performance management system can ensure that the organization's strategy is being supported by everyone.

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(Footnotes)
1. Service members in pay grades E - 1 through E - 4 are usually in training or on their initial assignment. These grades receive Proficiency and Conduct marks which are commonly called Pros and Cons. They are both based on a 0.0 - 5.0 scale. A rating below 4.0 must be accompanies by a formal reprimand. Major General, Lieutenant General, and General receive a letter once a year regarding their performance.
2. Civilians can obtain a copy by searching the U.S. Marine Corp site at http://www.usmc.mil.
3. Under normal circumstances, I would try to make daily entries on my 41 Marines to ensure that I was giving them an honest evaluation.

Counterpoint:

Is Training a "Bad" Word?

by Candace Zacher, Ph.D.

The article "Elevating Our Profession" in the Winter 2006 issue of Training Today motivated me to offer a counterpoint regarding the words we use to communicate our value to organizations. As a learning community, I think continuous dialogue and thoughtful reflection on this issue is beneficial to all of us. I present this article in this spirit.

Historical Perspective

I have been in the field of Instructional Design for almost thirty years, the last twenty-five of which have been in corporate training environments. During this period, I have witnessed many discussions centering on changing titles and descriptions for training.

When the topic of what we should call ourselves comes up, I often share that the field of Instructional Design has also seemed to be in a constant state of searching for a name for over 60 years. It has changed its name periodically to reflect trends or represent the essence of the field more clearly.

Historically, Instructional Design has been housed in colleges of education. It started out as Audio-Visual (A/V) education to enable educators to become media specialists. Then, in the 1960's, the name changed to Instructional Technology to emphasize the use of technology to develop and deliver learning solutions to children and adults. Sometime in the late 1980's, the term Performance Technology caught on. Since there is no agreement on the term, many of us select whatever term we want to use.

Can words redefine perception?

I struggle with the emphasis on simply changing the words we use to describe what we do, or who we are, in an attempt to redefine the outside perception of us. It is not enough to simply tell people what we want to be called. It is more important that our words communicate clear evidence of strategic execution that produces organizational results.

For example, the current usage of Workplace Learning and Performance may stem from an effort to focus business'

attention on the areas in which we excel. But I find it interesting that the words we want to substitute for "training" appear to be variations on the same theme. I think our corporate level executives (CEO, CFO, etc.) will too easily be able to translate these new terms back into the word we may no longer want to use.

I agree that the word "training", as well as the corresponding functional units in many companies, has often gotten bad raps. But, the word does provide a familiar mental schema to companies who are not well-versed or interested in the fine nuances of our jargon.

In addition I have not found, as the article suggested, that "training" conjures up images of a lack of enthusiasm for training. I do think, though, that some people do not care to attend training because of past experiences in which they were sent to training for the wrong reasons. If lack of enthusiasm was meant to refer to boredom with the design of instruction or delivery, then we need to investigate alternative instructional strategies that are more engaging.

I think words alone are also insufficient to assist some of our colleagues in knowing how to position themselves strategically within their companies. Although dialogue is needed, I think providing real concrete examples of actual behavior is needed so that "being more visible," as the article suggests, is understood and synthesized into everyday corporate behavior. Remember each opportunity "to be visible" can have a positive or negative outcome; I think we would all rather have positive visibility.

The real challenge

Although language does contribute to branding and image, it is not the primary reason that training departments struggle to position themselves more strategically. Instead, I see two critical reasons for the current situation and they have nothing to do with our words. The two factors are our inability to:

1. Escape our past and
2. Invent a sustainable future

The trouble with past performance is that many training departments have a history of being very successful as measured by trainees' level one evaluations; employees are generally satisfied with their learning experiences. And, companies have relied on, and accepted, these numbers as key indicators of the training department's value. But, as Gary Hamel pointed out in Competing for the Future, "Whatever a department's past triumphs have been, future success is far from inevitable in today's workplace."

Level one evaluations are, however, not the only factor on which our value is judged, and today every department in a company is under scrutiny to prove their worth. If they don't, survival may not be an option. Negative perceptions of our past also include the recognition that many departments are cost centers and the opinion that we are targeting lower levels of knowledge instead of higher levels of actionable behavior in our training design.

Our struggle to invent a sustainable future is influenced by several factors as well. Three factors are: a deep contentment with current development models, an often misguided belief that numbers of programs and attendees showed evidence of accomplishment, and a lack of utilizing evaluations as a business driver. These factors may explain why many of us are guilty of devoting too much energy to preserving the past and not enough in creating the future.

Using Words Effectively

Although changing a name or title may not have a significant effect, I believe that we can do a better job of presenting ourselves. So let's play out this workplace scenario: The CEO of your company steps into the elevator with you and asks, "Who are you and what do you do here?" You have 90 seconds to respond – to make an impact for yourself and your department - before he or she reaches the selected floor. What would you say? Do

you think your response would be one that the CEO would remember at the end of the day? And better yet, would he or she think about your response in terms of the current company's business challenges? The answer to this question is worth a careful choice of words.
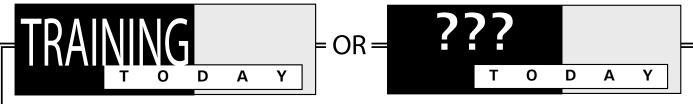
In this scenario, I agree that "training" may not be the initial word I would use unless it was in my title. But I would be sure to use business terms that a C-level person could relate to such as "strategic, execution, operationalize, talent development" in describing my value to the company.

I should also point out that I fully agree with the article's discussion of the importance of expanding the documents we read to include a heavy dose of business books and magazines. However, in addition to reading these materials, we need to reflect on their application to our profession. Dropping a few new business terms here and there in our conversations without being able to explain their relevance in a learning context is not going to get us to the executive table or keep us there very long.

To summarize, I believe that a discussion of new terms and words to describe ourselves and our profession is a worthy endeavor. At the same time, however, words alone are not the cause of the challenges and difficulties that we face today. We need to examine the underlying causes of those difficulties and design solid business strategies that will elevate the profession to where it belongs as a strategic partner with each and every company.

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TRAINING TODAY = OR = ??? TODAY

Attention readers of the TT Quarterly Magazine: We have a challenge for you!

Training Today has been a mainstay in our Chicagoland Learning and Performance community for many years. The CCASTD board extends a huge "thank you" to everyone that has helped make it happen. Special thanks for the meticulous direction of great editors and staff and most recently, Karen Bolek. Thanks also to the many published authors for their contributions and to our sponsors for their support. We are proud to say we have won many awards and have provided a great resource for Workplace Learning and Performance Professionals.

2006 is about change and, as a part of this new beginning, we are considering changing the name of our Training Today magazine. Yes, Training Today is a brand name—do we keep this title to maintain continuity or rename the magazine to reflect the new certification process and our roles as Workplace Learning and Performance Professionals?

If we look at National ASTD and their "State of the Industry" Report, we find only a handful of organizations that still use the word "training." We could follow ASTD National's lead and replace the word Training in Training Today with "Workplace Learning and Performance". The result would be: Workplace Learning and Development Today.

We'd like to hear from you. Do you want to keep the name Training Today? Do you like Workplace Learning and Performance Today. Or, do you have a creative idea for a new name? Please let us know!

Send your name suggestion to cathryngoodman@yahoo.com and we will report the nominations in the Spring Quarterly Magazine. Thanks for your help!

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Alliance Organizations

ACPI
Association of Career Professionals International: www.acpinternational.org

CCASTD
Chicago Chapter of the American Society for Training & Development: www.ccastd.org

CISPI
Chicago Chapter of the International Society for Performance Improvement: www.cispi.com

CODIC
Chicago Organizational Development Institute Chapter: www.codic.us

ICFC
International Coaching Federation of Chicago: www.chicagocoaches.com

NSA-IL
National Speakers Association-Illinois: www.nsa-il.org

ODNC
Organization Development Network-Chicago: www.odnetwork.org/odnc

SHRP
Society for Human Resource Professionals (Chicago Chapter of SHRM): www.shrp.org

SITE
Society of Insurance Trainers & Educators: www.insurancetrainers.org

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