TRAINING TODAY

CHICAGOLAND CHAPTER ASTD WORKPLACE LEARNING & PERFORMANCE

SUMMER 2008

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

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Training Today, the magazine of the Chicagoland Chapter of ASTD, is published four times a year as a service to its membership.

WINNER APEX '98 AWARDS FOR PUBLICATION EXCELLENCE

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Letter From the Editor

Have you done homework lately?

Well, I've finally done it. I'm finishing my masters degree. The week I write this I have attended class on Saturday, have an assignment due on Monday, a second assignment due on Wednesday and a third assignment due on Sunday. So, let's take stock. I work more than full time (often includes travel), and now have a significant amount of homework, research, papers, and classes to attend. It is demanding.

Funny thing, though. I'm currently facilitating workshops for a major retail chain. This is a series of three workshops and is part of their requirements to prepare for a store management position. They work more than full time, they have courses to attend (often requires travel), they have online assignments, tests to study for, and store projects to do. It is demanding.

Empathy is a marvelous thing! What a gift for us to see what it feels like for our participants. It gives us insights into what they are experiencing. If they are stressed because of an upcoming presentation or role play, we can remember what that was like for us when we were doing something uncomfortable for the first time — maybe in front of peers.

Empathy is an important trait for our business. It contributes to creating a safe environment for participants. It contributes to the human connection between the students and the facilitator. It can help in developing a new relationship with a client, stakeholder, SME, or boss.

I know many people who are working on credentials — a CPLP, degree program, or certification for their field. Many are doing this while working full time, perhaps parenting, and trying to have a life. When I started in this business 20 years ago, there were few credentials in the field. I began my T & D career in sales training and the important credentials were sales experience, success in account management, and sales management. This gave the trainers credibility in front of the audiences. The field has changed and now there are several different ways to gain credentials and learn the different parts of the business of developing people.

I hope you gain some great ideas in this issue. People have been asking for mentoring and it has arrived. Stephanie Oakley is leading this for the organization and details are inside. Thanks to the other contributors of this issue as well.

Hope you can enjoy some summer!

Until next issue,

Renie McClay
www.salestrainingutopia.com

Calling All Mentors!

The Chicagoland Chapter of the American Society for Training and Development (CCASTD) is proud to partner with Triple Creek Associates in the launch of a new mentoring program, which makes use of Open Mentoring®, a web-based tool that facilitates the matching and monitoring of mentoring relationships. Open Mentoring® is a web-based personal development application that facilitates both face-to-face and distance mentoring processes. It incorporates the best features of both informal and formal mentoring approaches and provides a structure to encourage the continuation of the mentoring process and flexibility to meet both Mentor and Mentee needs.

Our goal is to provide one-on-one mentoring opportunities for members of CCASTD who are interested in learning from reflection, sharing expertise as a growing professional, creating a vehicle for relevant problem solving and informal learning, and providing a vehicle for strengthening the profession. Mentoring provides an opportunity for both mentors and mentees to learn and grow by connecting professionals with common interests and needs, and also providing a forum for them to support one another.

Mentoring provides value to both the Mentee and Mentor. Specifically, the value of mentoring to the Mentee includes:

- Expanded personal network
- A sounding board for testing ideas and plans
- Positive and constructive feedback on professional and personal development
- Increased self-awareness and self-discipline
- Accelerated development and growth

The value to the Mentor includes:

- Increased transference of expertise and experience
- Increased ability to translate values and strategies into productive actions
- Investment in the future of the profession
- Opportunity to "give back"

Currently, we are actively recruiting mentors for this program. We ask that mentors have at least five years of workplace learning and performance industry experience, but at this time *mentors need not be members of CCASTD to participate*. However, CCASTD membership will be required to participate as a mentee. We encourage everyone to get involved in this highly rewarding and beneficial program.

To sign up as a mentor, email Stephanie Oakley at stephanie.oakley@gmail.com. Mentee enrollment will be announced in the coming weeks.

Changing Mentoring Perceptions

by Tom McGee

Rarely do people move ahead without significant help from others. From time to time, we all find ourselves needing to bounce ideas off of someone or looking for guidance from a colleague who has walked this path before us. Many organizations are encouraging an age-old practice to address this modern dilemma: mentoring. Mentoring provides a way for us to gather and process information in a practical and useful manner, where we can integrate our new knowledge and skills into our current job responsibilities. In my experience as a professional in the mentoring arena, one common barrier is a hierarchical and restricted view of mentoring. For the power of mentoring to be unleashed on a personal and organizational level, we need to change our perception of what mentoring is.

Eye of the Beholder

When people think of mentoring, they often think of one person in a supervisory or senior position grooming a junior colleague to one day take over that position. This type of grooming mentoring certainly exists, but this narrow definition does not encompass the full range of what mentoring can be. Mentoring can be:

- Deciding for yourself that you have a skill or knowledge gap and then going out to find someone who can help you address it—not waiting for someone to offer you the help.
- Looking for an expert at any level in the organization, not just someone in a more senior position than you.
- Seeking guidance and insight for a limited topic or need, not necessarily looking for a lifelong advisor.

In fact, a new perspective of mentoring moves away from the idea that people can only have one mentor at a time, and instead opens up the possibilities for having multiple mentors, all at the same time, and all meeting different needs. Rather than having one mentor who is grooming you to ascend to his/her role, a better model is to have a network of people who can guide, help, and teach you — all of whom have your development in mind and any of whom can advise you as needed. Defined as "network mentoring" by Mara H. Wasburn and Alexander W. Crispo of Purdue University, this new way of thinking about mentoring offers a more egalitarian and open development process. Multiple mentors can be from different parts of the organization and at different levels. Some could even be from outside the organization. They could be from different countries, have different backgrounds, be different races, genders or ethnicities. In short, they could be anyone. If they have the skills and knowledge you wish to acquire, and they are willing to help, you have found a mentor.

Through these knowledge networks, learning is not limited to only mentees; mentors can learn in these relationships as well, and in fact are encouraged to pursue their own development through their mentoring relationship. It is human nature that when we teach someone, we re-engage in learning ourselves. Mentors can learn and gain just as much from mentoring as mentees can.

Triple Creek Associates developed a Mentoring Levels™ model (see Figure 1) in the late 1990s as a simple conceptual diagram to change the way people perceive and practice mentoring. This model helps depict mentoring as a flexible personal development strategy.

Each of us can create an individual knowledge network that addresses our most pressing developmental needs. Not every relationship needs to be a highly intensive, career-guiding relationship (Advocacy) that requires high levels of accountability and trust. Some relationships may be more focused on developing certain skills, with the mentor playing a teaching or coaching role. These skill level relationships may be more short-term, ending when we feel we have enough mastery of the skill. Or maybe we engage in a reverse mentoring relationship, where we ask a new hire to teach us some latest technology program or share with us some new business theory they learned about in school. These relationships often exist at the informational level and can be quite short-term in nature, ending when we have received the needed information. Regardless of the type and duration, the important thing to remember is this: Every day is filled with learning opportunities, and this tiered approach to mentoring can help put those experiences into context.

Assembling Your Team of Advisors

To assemble a personal team of mentors, you need to look beyond senior leaders or people whose job you aspire to, and instead look to the wide array of people around you who have expertise and experience that you can learn from. To embrace this new perception of mentoring, you need to shift your thinking to a more collaborative, developmentally focused view of mentoring, one in which you are creating an individual knowledge network.

With the expanded scope of mentoring in mind, you can now begin assembling your personal team of advisors. To help you capture your thoughts on paper, draw a table with two columns. Label the column on the left "Current Key Issues." Label the column on the right "People I Know." Once you have that finished, you are ready to start brainstorming about your development needs and who can help you fill them.

First, in the left-hand column, list a few areas of your personal and professional development that you would like to explore. This list can include career choices, skills you want to develop or hone, and information you need to gain more expertise in.

Next, in the right-hand column, list people you know whom you admire and respect. Don't worry about matching them up at this point; just think broadly about current and former coworkers, colleagues, friends, bosses, teachers, etc. Try to come up with a list of at least eight to 10 names.

Finally, reflect on each person: what they are like, what experience or expertise they have that may be helpful, what you admire about each, and the like. Keep in mind that someone does not have to be an "expert" in your area of need to be helpful. Sometimes, having a mentor who can ask probing questions without the clutter of knowing a lot about the issue can be very helpful in clarifying your own thinking. As you reflect, draw lines from the person on the right to the needs you think they can fit on the left. In the end, your worksheet should look something like the one in Figure 2.

At this point, you should have a number of people you could approach about being one of your mentors. You don't have to immediately ask all of the people on your list to help you, but do get started with someone on the list, perhaps the person you feel most comfortable with or the person whose name is connected to the development issue that means the most to you. *No matter how you choose to go about*

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it, be sure you take that next step and actually ask someone.

This is the most difficult part of mentoring for most people—actually asking. Keep in mind that research shows mentors benefit just as much from the relationship as mentees. You are never imposing by asking. However you do need to be clear on your needs and expectations. Triple Creek's latest research found that investing one to three hours a month on mentoring produced highly satisfying relationships for participants, but spending 30 minutes or less produced less satisfactory relationships for both parties.

Best Practice Blueprints

To help you get started, consider these suggestions:

- Don't use the word mentor. People are so indoctrinated with the grooming view of mentoring that the moniker "mentor" may scare them, bringing up visions of lifelong commitments. Instead, try a more casual approach where you ask them to be an informal advisor. Succinctly describe what you are looking for and why you are asking this person in particular. For example, "Hi, Andrea. I know you have a full-time job and family obligations, but you still manage to find time to coach softball. Would you be willing to have coffee sometime and help me think though some similar issues in my life?" See what develops from the first meeting.
- Use email and the phone. It is sometime less scary for both parties to use distance technology than to meet face-to-face. Again, you want to succinctly describe what you are looking for and why you are asking this person for help, not lay out the whole mentoring plan. A simple email might look like this: "Sherry, I know it has been a while, but I was thinking about people I respect and your name came to mind. I am facing some decisions and career choices, and you helped me a great deal when I worked for you. Would you be willing to talk to me on the phone to see if you could possibly help me on an ongoing basis for a few months as I work through these career decisions?"
- Suggest small commitments at first, but do ask for at least an hour of their time each month. If any of these relationships feel helpful after the first meeting, suggest a small commitment, such as trying the relationship out for three months, with a bi-weekly half-hour call or face-to-face meeting planned. Remember, investing one to three hours a month produces very satisfactory relationships.

While these suggestions are written for individuals getting started with mentoring, some of you may also be wondering how you can encourage mentoring in your organizations. To begin with, encourage a broader view of mentoring, like the one highlighted in this article. This is critical to creating a mentoring culture in which people proactively seek out helpful development relationships.

Larger or geographically distributed organizations may want to consider leveraging technology to create an environment where assembling a network of mentors is made simple and more straightforward, and where learning and knowledge transfer across the enterprise is accelerated. Many organizations are using web-based mentoring systems to facilitate learning, match participants, expand mentoring to everyone, and create a mentoring culture.

Lastly, share stories with people about your own mentors and how you came to view them as such. Show through your example how mentoring can be. Helping people see the simplicity of it will help them see the possibilities of putting together their own team of advisors.

Creating individual knowledge networks is a new approach to the time-tested practice of mentoring that addresses the complex and changing needs of today's workers. Broadening the view and use of mentoring can close the knowledge and skill gap that many workers feel and can help organizations build a workforce that is informed and engaged.

Tom McGee, V.P. of Special Projects for Triple Creek Associates, oversees research projects on web-based mentoring and leads writing projects for white papers and booklets on mentoring. Tom also directs the research, expansion, and delivery of mentoring training programs. He has over 20 years of leadership and consulting experience.

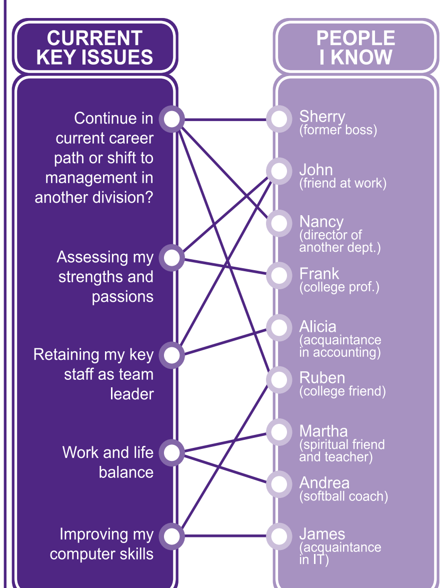
Triple Creek Associates helps organizations build cultures of learning and development through web-based mentoring programs. Their flagship web-based mentoring product, Open Mentoring®, is a fully supported, comprehensive Software as a Service (SaaS) solution that allows organizations to auto-match, manage, and measure mentoring relationships built around customized learning projects. Triple Creek currently brings web-based mentoring and support to more than 100 market-leading organizations with users in 56 countries. They are the official mentoring provider for CCASTD and offer free mentoring resources, such as a monthly newsletter with exercises, online at www.3creek.com.

Figure 1

- **© Triple Creek Associates**

- ***Information Level:***
  - *Resourcing*
  - *Advising*
  - *Enlightening*
- ***Skill Level:***
  - *Teaching*
  - *Coaching*
  - *Modeling*
- ***Advocacy Level:***
  - *Guiding*
  - *Consulting*
  - *Sponsoring*
    (Advocating Career)

Figure 2



Learning & Development: *Where Does it Fit in Talent Management?*

by Julie Jaques

One of the newer HR models and best practice areas being talked about these days is Talent Management. You might ask, so what is it and where does Learning & Development fit in?

As we've all learned over the years, trends in learning and development continue to evolve. At one point, the buzz was all about Training Departments and Corporate Universities. Then came Performance Consulting with more of a strategic focus on being a business partner and service provider. Today all the talk is about Talent Management and aligning the people side with the business strategy and goals.

I've been around long enough to expand my expertise and knowledge base in all these models and approaches, as I'm sure many of you have. It's awesome and very rewarding that as L&D professionals we're able to continually elevate our contributions to our businesses by addressing the talent side of the equation. With the tougher economic climate and competitive landscape, the need for organizations to work smarter and leverage the strengths of their people is more important than ever.

I don't know about you, but I love the fact that our profession continues to gain credibility. It sure appears as if there's more jobs out there in L&D and Talent Management (regardless of the different titles out there!) than there was even a couple of years ago. Many of my OD/L&D consulting friends also tell me their businesses are doing well. It seems more organizations are putting their money where their mouth is when it comes to defining required competencies and dedicating resources to strengthening and building their leadership pipelines. You can't open a business publication these days without seeing something on the best practices within a progressive people-focused company.

As part of my search for a new career position this year I've seized the opportunity to delve deeper into the Talent Management arena. By doing so, it's helped me navigate and prepare my value proposition to prospective employers and networking contacts. One of the true values has come in linking my past work with talent management methods and models so that I can better add value for my future employer.

OK, so back to the initial question. Where does L&D fit in with Talent Management? Bersin & Associates (a cutting-edge research and consulting organization) defines Talent Management as "*A set of organizational processes designed to attract, manage, develop, motivate and retain key people*." The way I see it is that L&D pretty much plays a role in each of these talent management areas, right? While we are passionate about our contributions in L&D, the pieces of the talent management puzzle also include Competency Management, Talent Acquisition, Compensation & Rewards, Leadership Development, Succession Planning, and Performance Management. Quite a bit different from the days of the more archaic HR roles, huh?

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So if L&D plays an integral role in talent management, how are you aligning your strategic and tactical efforts with the rest of the pieces?

- Are you developing your L&D programs and processes to support and reinforce the core company values and related competencies?
- Are you customizing learning solutions to deliver outcomes based on defined functional and leadership competencies? If competencies haven't yet been defined, what are you doing to help company leaders and HR Business Partners get started on this?
- What work have you been involved in that contributes to workforce planning? Have you partnered with your Talent Acquisition peers to help them more strategically identify the skills and values needed to support future company growth and required skill sets?
- What information are you sharing with your Compensation and Rewards peers about what you learn while spending time with company employees? Do you hear common themes when you're in the classroom that might be worth sharing?
- What role can you play in Succession Planning? In many cases, L&D professionals know more about their businesses since they spend more time with employees. How can you leverage your observations of the performance and potential of trainees?
- How are your L&D programs and processes in line with development needs of high potentials that may be included in your company's succession plan?
- How have you been able to partner with leaders and peers to build and support a succession planning process?
- Do you spend time with leaders and managers on the topic of performance management? What practical tools and models can you develop to make the process a bit simpler?
- How do you communicate the critical importance of facilitating ongoing coaching with their direct reports (separate from the sometimes onerous annual review process)?

According to Bersin & Associates, coaching has the highest impact within the performance management/talent management practices.

- What training and tools do you have in place that provide managers with skill practice opportunities in coaching and career development?
- In partnership with organization leaders, how have you been able to extract common development themes that are documented within performance reviews?
- Have you evaluated your L&D offerings to see if you're following the trends away from investment in functional training and more towards career development?

There are many more questions that those of us in L&D can ask ourselves related to how we're adding value beyond our job scope. I've had the privilege of working in mid-sized companies where I was able to wear multiple hats. This afforded me the opportunity to contribute in other areas of talent management. It's especially rewarding and exciting to link our L&D programs and processes to a bigger talent picture, one where we get the satisfaction that comes with knowing that we're helping contribute to a higher performance workplace.

So we know that L&D is a critical part of talent management. We also know that 70-80% of what people learn they learn on the job. While classroom training still has its place in workplace learning and performance, what can we do as WPL professionals to boost effectiveness of on-the-job training? What can we do to leverage knowledge management and performance support tools?

I'm a firm believer in providing managers with simple tools to reinforce training and better ensure that new skills and competencies are applied back on the job. Consider extracting portable tools from the training you offer. There's no need to reinvent the wheel. For example, after facilitating a "Leaders Growing Other Leaders" program I extracted the simple career coaching steps in the model and added some customized examples, scripts, OJT development ideas, and templates that aided managers in using the process with their direct reports. If you keep things simple you increase your chances of trainees actually using the tools.

To add even further complexity to the business of L&D within talent management, we're all faced with the varied ways that different generations of employees learn best. The Traditionalists are accustomed to "being taught", the Boomers are comfortable with being led to information, Gen Xers want to be connected to people and the Millennials prefer to be connected to everything. Of course, technology has changed the way many of us learn. As L&D professionals, we need to help create a work environment where learners are self-directed and can build their own learning. The hot topic these days is "on demand learning". Content is everywhere, SMEs are more involved in developing learning (after all, we can't be experts in everything!), learning is mobile, disconnected and decentralized, and rich media is more common.

If we are to evolve into L&D talent management professionals we must focus more on the "context" versus the content of our learning programs and processes. When we link our L&D efforts to the business strategy and goals, help our stakeholders see the big picture, and integrate L&D within other areas of talent management we become much more strategic in our approach. Better yet, the outcomes contribute to our organizations performance culture and a more robust leadership pipeline. That's what jazzes me!

Julie Jacques has held multiple director level positions within mid-sized and large companies in the areas of learning and development, talent management, and organizational development. Earlier in Julie's career, she held positions in sales, operations, marketing, and communications. Her experience in managing P&Ls, leading teams, developing business plans, project management and all aspects of OD and training within a corporate and field retail environment have provided vast exposure and a true passion for the talent management arena. She is a past board member of CCASTD and very active in the Chicago learning and development community. You can reach Julie at 847-428-2489 or at jaxmax3@aol.com.

Smart Recruiting and Training for Smart Twenty-Something Hires

by Alexandra Levit

Human resources circles are buzzing about the impending "brain drain" in American organizations – and with good reason. The Baby Boomers, the largest generation in our history, will begin retiring in huge numbers in the next five years, and because of slow population growth between 1966 and 1985, there aren't enough young workers to replace them. You, along with every hiring manager in every successful organization, will be competing to attract and retain the best talent among the seven million college graduates just joining the workforce. Therefore, it's essential that you are well-informed regarding recruitment and training tactics tailored to this group.

The traditional college recruiting process is changing to meet the needs of the empowered, ambitious, and demanding Millennial Generation (born 1977-93), and your relationships with this age group must begin while students are still in school. If you don't have a formal internship program underway, contact the career services offices at universities in your area to start one immediately. Because Millennials are eager to learn and supremely motivated to increase their skill sets, you don't necessarily have to pay interns a lot, but you do have to show them respect and offer them challenging and engaging work. For instance, IBM's Extreme Blue internship program makes sure that interns don't end up making photocopies, instead pairing them with computer developers, doing real company work in global research labs. A strong internship program is a critical part of your entry-level recruiting strategy because it allows you to recruit and train the best talent before it is snapped up by competitors, and also to observe individuals in action before making a substantial commitment to them.

In addition to interns, you should be targeting soon-to-be graduates. In the old days, college recruiting consisted of spending days at a time on the road, shepherding thousands of random students past a drab-colored booth. Now, however, successful college relations programs involve fully partnering with staff from campus career planning and placement offices. Christopher Pritchard, author of 101 Strategies for Recruiting Success, recommends sending campus staff requisitions on a weekly basis, working with them to ensure that they have an adequate understanding of each position, and promising a personal phone or face-to-face interview for every qualified student applicant they introduce to you. When you're on campus, "meet with key faculty, staff, and student leadership," says Pritchard. "Ask them what organizations on campus you might contact, and if there are opportunities for you to present seminars or guest lectures."

The following are tips for persuading discerning twenty-somethings to choose your organization:

- **Put On Your Best Face:**
  "College students expect employers to be prepared," says Pattie Giordani, in her article *Y Recruiting*. "On campus, they expect to interact with skilled recruiters who can give specific information about opportunities and provide a realistic view of the organization's culture. Because of this generation's emphasis on personal contact, nothing is more important than the people an organization chooses to represent its face."
- **Show Them How They'll Fit In:**
  "Millennials want to join an organization that reflects their own values," says Carol Kinsey Gorman, in her article *Ready or Not, Here They Come*. "That's why companies like Disney have applicants watch a video that explains their standards, rules, dress code, and expected behaviors before they even fill out an application." Millennials take jobs not because of money, but because working for the organization will allow them to make a difference in the world — so show them how you can help them do that.
- **Use Online Tools:**
  Millennials expect an intuitive and efficient company Web site and want to fill out applications and other basic information online. They also use the Internet to seek out the opinions and perspectives of their most trusted information sources. "You have to seek out those sources and cater to the Millennials' near over-reliance on technology," says David Hyatt, President of CorVirtus. "Ernst & Young, for instance, was the first employer with its own page on Facebook.com, Sony created an internship recruitment video for YouTube, and Honeywell has a blog on its corporate Web site that HR Recruiting professionals use to communicate directly with prospective employees. Try to stay in tune with the popular criticisms of your company via the web and address those directly in your interviews." One word of caution, though: Millennials don't want you to rely too much on technology during the recruitment process. Online interactions can be cold and dehumanizing, so remember to add personal touches wherever possible.
- **Connect Them With Someone Their Own Age:**
  Millennial candidates have been advertised to all their lives and as a result are somewhat cynical. Because they're most likely to trust each other, hook them up with a satisfied employee of the same generation who can answer questions and address concerns about the job.
- **Manage the Relationship:**
  "Candidate Relationship Management (CRM) is a mindset that understands the importance of the relationship between the recruiter and the potential recruit," says Gorman. "The way a candidate is treated by recruiters sets the tone for his or her initial impression of the organization." CRM tactics include showing personal interest in each Millennial candidate, answering questions and providing requested information in a timely manner, and keeping candidates in the loop over the course of the process.

Once twenty-something employees are on board, how can you train them effectively so they still stay with your organization for the long-term? Some suggestions include:

- **On the Job Training:**
  On the job training, also known as OJT or side-by-side training, involves having a Millennial employee work directly with someone who already performs that function and practice relevant tasks in a supervised environment. While this type of training is less structured than formal coursework, it's also less expensive, requires less ongoing maintenance, and has

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less of an impact on daily productivity. It also facilitates the new employee's integration into his department and allows him to get a well-rounded perspective, up front, on all of his job duties.

- **Job Rotation:**
  Many companies I've visited recently have leadership development programs for Millennials that center around the concept of job rotation. Job rotation is a training approach that involves moving employees to various departments or areas of a company, or to various jobs within a single department. "PricewaterhouseCoopers (PwC) is an example of a successful job rotation program," says Hyatt. "Its Tours of Duty program typically lasts one to two years and allows people to rotate among different PwC consulting teams around the world. Consultants who are on tour are able to enhance the host team's ability to meet its business needs by sharing their knowledge and skills with team members. In the process, consultants develop language skills, experience a foreign culture, and enhance their technical and interpersonal skill sets." As with other training techniques, job rotation is most successful if it is part of an overall career development system that offers twenty-something employees a variety of job-relevant experiences and opportunities.
- **Mentoring Programs:**
  I swear by mentoring as one of the best ways to assimilate Millennial employees into an organization, teach them what they need to know to be productive, and send the message that you think they're important and care about their growth. Selecting appropriate mentors for your program is one of the most critical parts of your process. According to Harvard Business Essentials' *Hiring and Keeping the Best People*, you should seek mentor candidates who can empathize with an employee facing special challenges, have a nurturing attitude, exemplify the best of the company's culture, and have rock-solid links to the organization.

By paying attention now and beginning to implement the recruitment and training tactics that will make your company successful with this generation of twenty-somethings, you will be one step ahead of those organizations scrambling when the labor shortage inevitably becomes a reality.

Alexandra Levit is the author of the new book Success for Hire: Simple Strategies to Find and Keep Outstanding Employees (ASTD Press). Born at the tail end of Generation X herself, she serves as a bridge of understanding and collaboration between older workers and the new college graduates just entering the workplace. Levit speaks frequently at corporations and conferences around the country and writes an advice column for the Huffington Post. Learn more at www.alexandralevit.com.

Playing Cards in Class

How many ways can you split up a topic? How much can be learned by putting things back together again that have been split? "Shuffling a deck" of mixed items that were once together is a simple process and can reinforce lessons on processes or important combinations of elements.

A card game is a way to vary the teaching methodology and have an activity that is learner centered.

Here's how to do it:

1. Determine the skills or knowledge area. Examples:
   - Selling the benefits of Product X to customers with different needs
   - Following a prescribed call procedure in detail
   - Matching feature, advantage, benefit
   - Sequentially laying out an established process
2. Divide it into its component parts. Examples:
   - Five different customers with five different sets of needs. Ten or fifteen product benefits that could help each customer in appropriate combinations.
   - The ten step call procedure and the many tasks that are to be accomplished in each call.
3. Write all the component parts on card-shaped sections of card stock. Print and cut.
4. Shuffle all the cards to mix them up.
5. Have participants sort them. Have a discussion about the various combinations.

Notes:

The project is best done in groups of four to five, where people can all see all the cards laid out.

In groups larger than five, you will need a set of cards for each small group.

*The main content of the lessons should be taught **before** the game. For example, in the "selling benefits" example, participants should be given examples and work through benefit/customer combinations and in example "b", participants should be aware of the ten step call and its components. This is critical, because the game is just one more way to teach complex subjects and cannot be a substitute for adequate instruction. Also, if the material is not understood before the game, the game will become extremely frustrating.*

There should always be a follow-up discussion at the end of the game. While challenging questions are good, there should be no ambiguity about the "right" answers, once you explain them.

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Keys to Success When Working with Clients

One thing that internal and external consultants have in common is working with clients. Here are some thoughts on how two consultants do this.

In a virtual panel format, we will "hear" from:
***Susanne Conrad**, Director, Organizational Effectiveness & Development with Dechert-Hampe & Co.,*
***Becky Stewart-Gross Ph.D.**, President and Founder of Building Bridges.*

TT: What are some tips for working with a new client?

Susanne:

- *Establish a pattern and habit of open, frequent and candid communication*
- *Over-deliver on their expectations within budget and scope*
- *Continually address 2 elements: (1) the working relationship with the client; and (2) the content/deliverable. To succeed, you must deliver excellence for both.*
- *Never miss a deadline or go over budget unless it is client driven. No surprises to the client allowed.*
- *Remember, it's not about you but about providing a product/service that accomplishes what the client wants/needs.*

Becky:

1. *The first key is to ask lots of questions about the client's current needs and what changes they would like to see for the future.*
2. *The second key is to find out what other training they participated in so that your project can be built upon past training. This creates a seamless flow, rather than having training seen as disjointed.*
3. *The third key is ask the right questions and listen well to determine if this is a training issue and then if it is an area in which you can be of assistance.*
4. *The fourth key is to be a resource to them.*

TT: What about working with a client that doesn't know what they want? What tips do you have in that situation?

Susanne:

If a client doesn't know what they want, your job is to help them figure it out and deliver it. That's the fundamental job of an outside consultant– if they knew what they wanted, they likely wouldn't need you. You should walk the client through a structured series of steps that leads to the solution options and gain consensus with the client on the option they wish to pursue.

If you have a client who believes they know what they want but their approach will not deliver the desired results, that is a wholly different issue. It's your job as a consultant to ask the questions that help determine whether what they've asked for will resolve the underlying business needs – training may or may not be the answer. Otherwise, regardless of how excellent your deliverable is, it won't solve their need and your project will be considered unsuccessful by the client.

Becky:

1. *The first key is to uncover the issues being dealt with by the group. To uncover the issues ask questions such as:*
   - *What skills do they want to be better at doing?*
   - *What skills and abilities do they want to have in the future?*
   - *What are their current challenges?*
2. *The second key is to find out what they have accomplished or tried in the past and what has or has not worked.*
3. *The third key is to remember that training may not be the answer. The situation may call for coaching, consulting, or a different consultant.*

TT: How do you ensure the success of a project when working with a client?

At the project onset:

Susanne:

You must take time to discuss concrete objectives, roles, process, stakeholders, etc. with the client BEFORE you begin the actual work. Often this is just a solidly structured kickoff meeting, but too many clients and consultants jump right into the work without the proper groundwork.

For example, when working on a major, corporate-wide project with ConAgra, we held a project kickoff meeting with the Executive Management Team. We laid out the exact objectives/deliverables/outcomes/process/implications we had suggested in the proposal. Although every member of the management team had agreed to the proposal and moving ahead, this discussion brought to light the differences in understanding and expectations that could have derailed this project. The same held true when discussing the roles for each member and stakeholder in the team.

Making adjustments at this stage ensured buy-in. It also ensured that the organization understood our process, supported it and clearly understood what it would/would not accomplish. End result – we had to delay start on the actual work to build consensus around these issues, but it allowed the project to move forward much more quickly and with total support from the management team.

Becky:

The key is to ask a lot of questions of the right people. Some of the questions might include:

1. Is this training to be used with all employees, or just specific groups?
2. How much will management be involved?
3. Will management participate in the training first or at all?
4. How much will management support the program?

Continued on next page

5. Will management make this a priority?
6. Will management help with the follow through?

In the data collection stage:

Susanne:

- *Determine the type of data needed and options for collecting it.*
- *Identify the best option(s) for getting objective and subjective data to give you the whole story. In some cases, you're limited to the data the client supplies rather than having the ability to obtain primary data, or are limited to subjective data.*
- *Identify ways to corroborate the data or ask questions about the data that indicate how accurate and complete the data is. A solid understanding of business and the ability to analyze and interpret data and business results is important.*
- *There is a huge difference between ranking and rating when it comes to data collection and often both must be considered. For example, asking how well a company is performing against a series of sales competencies should be augmented by asking how important each of these competencies is. A customer survey could indicate that the first four competencies are being performed excellently while the last is performed only average. Most would consider this performance very good. However, if that last competency is critical to the customer relationship and the rest are only incidentally important, we have a big problem.*
- *Convincing clients of this need is not always easy — providing examples, pitfalls and explaining the implications of not having accurate data is critical to success in obtaining the data needed. Obtaining that data usually requires a senior-level supporter within the organization to open the doors.*

Becky:

Some tips to remember:

1. *The first key is to be sure you are working with the right people. Sometimes these people are the leaders, sometimes they are the front line employees.*
2. *The second key is to learn as much as you can about the participants, their culture and their ways of thinking. This knowledge about the company can be obtained through observation, questions and reviewing company documents.*

During the "heat" or deadline crunches:

Susanne:

1. *Communicate with the client — the more they know about status, next steps, etc., the more comfortable they will be with your ability to deliver (and adjust deadlines if necessary!).*
2. *Just do it! Missing deadlines is unacceptable unless it's of the client's doing — in which case you must talk to them ASAP about the impact their actions will have on the deadline and budget.*
3. *Never lose your "cool" under pressure. You must maintain a professional status even if the client starts to crack a little. In fact, many of us may end up coaching the client through this stage.*

Becky:

The key to being effective is to build in testing to determine the results of the project. This can be accomplished by:

1. *Evaluating the results of the project with both formal and informal evaluations from participants and other leaders in the company.*
2. *Be aware of changes in the organization and how they might affect your project and the participants.*
3. *Adjust the training/materials based on the evaluations and identified changes in the organization.*

Toward the end or wrap up stage:

Susanne:

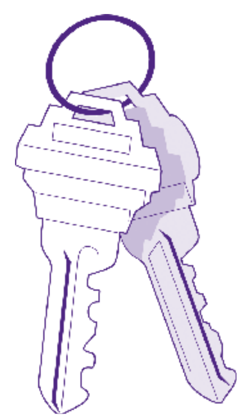
Measuring success of the actual deliverable is important. But, another thing that is incredibly important is to debrief the project with the client:

What worked or didn't, what you can do better the next time, how happy they are with the outcome. When I have these conversations, the clients often remark, "I'm so glad you asked about these things. No one ever bothers to do that."

Becky:

The key to a successful conclusion stage is to evaluate the training program at the end of the project. This can be accomplished as you:

1. *Follow up to see if the needs of the participants were met and if the expectations of the client were met.*
2. *Discuss ways to keep the new knowledge fresh and applied. This can be with ongoing training or follow up activities.*



Susanne Conrad

Susanne Conrad is the Director, Organizational Effectiveness & Development with Dechert-Hampe & Co. She works with organizations on business strategies to enhance performance. Her focuses is on structured change management, high performance teams and organizational learning/development. She works with companies like Kraft, ConAgra, Mars, Sprint, and Bayer, in areas such as customer development, customer relationship management, organizational restructures, and process/workflow re-engineering. Susanne can be reached at SConrad@Dechert-Hampe.com.

Becky Stewart-Gross, Ph.D

Becky Stewart-Gross, Ph.D is president and founder of Building Bridges, offering custom-designed sales training and leadership development programs. She assists companies, teams, and individuals in building bridges to better communication. Becky is a member and recent board member of the Professional Society for Sales and Marketing Training, and was editor of their newsletter. Becky can be reached at www.BuildingBridges.com.

Who Should I Send to Sales Training?

by Teresa Hiatt

Although we can all conceptually agree that sending sales professionals to Sales Education Courses is a good idea, we have all heard the two basic complaints. "I sent some people to training, but they are still struggling". Or, "My people tell me it was good information, but they are already doing the things they covered in training". Both of these complaints are valid but the research shows they are more related to WHO attends the training, instead of the value of the training itself. Here, we will discuss the 7 different performance profiles and which ones are the ideal candidates for attending sales education courses.

Performance Profiles

Denis Pombriant writes about Performance Profiles in TechWorld News, a magazine devoted to Workflow Management and Sales Force Automation, "The top 20% of your sales force is going to succeed despite their managers and the bottom 20% will probably never reach full productivity. A sales manager should focus on helping deliver the tools and resources that 60% in the middle needs to succeed, and part of that is the very best of training that can be offered."

Although everyone at every skill level needs training to move to the next level (after all, Tiger Woods still works with a trainer on his golf swing), there are some "typical" performance profiles that can be used to help isolate who will benefit the **most** from training dollars invested. Let's look at some of the more common ones: The New Guy , the Rogue SuperStar, the One Hit Wonder, the Roller Coaster, the Almost There and the Drowning Victim.

The New Guy

Anyone new to a sales organization can be called the New Guy (Gal), even if they have sold before in a different organization. This is where sales managers often focus their training efforts, despite data that shows a poor return on investment. Obviously, they need the basic selling skills unique to the organization and an understanding of the products/services/solutions for sale, but what they mostly need is a massive initial training to give them the resources and then time to develop their sales techniques. The best way to support this profile type is with coaching, intense, constant, one-on-one coaching. Many top sales organizations actually have a quasi-sales manager that is devoted to coaching this group to success. But once the initial training on internal sales process and products/service is accomplished, training is not their major need and if they attend training other than the required during the 3-6 month period, it probably won't show any significant changes in behavior for this group.

The Rogue SuperStar

The next most common profile type to attend training is the SuperStar. They typically go to training because they really want to go, they ask to go, and since they are successful, the sales manager uses this group to fulfill any training goals management may have set for them. The problem is that this group won't benefit the most from your training dollar. They go to get positive reinforcement that they are doing all the right things. They will probably pick up a few tips and maybe refine a technique, but they really get more from sharing all of their experiences and successes with the group. They may even offer to "teach" the class, since they feel they obviously have lots of success. This would be great except that the research shows these top performers are exceptional, unique, and use in-born talents and methods that don't often work for the 60% that need repeatable, proven, process drive methods they can use with their own talents. The SuperStar goes willingly to training, says it is good stuff, but there is no noticeable change in behavior in the workplace (which is a good thing, because they are already hitting their numbers!).

The One Hit Wonder

A sales group of any size will often have a few One Hit Wonders. These are sales professionals that have seemingly miraculously gained an account or two closed a substantial sale. Since they have some numbers on the board, they don't generate immediate negative attention, but they aren't really what would be considered successful. They often spend a lot of time trying to duplicate what they did for the existing success but are unable to realize it was an anomaly, an oddball, and can't be used to stake a future career. Since they have enjoyed a great sale at least once, they have one of the best attitudes to accept educational instruction, since they are very motivated to repeat the success. This performance profile is often overlooked for training selection because it seems they have demonstrated they know how to sell, since they have a success in their pocket. If they do get to training, a sales manager may see dramatic results, since they can now frame their experience into solid foundational selling processes that can allow them to repeat their successes.

The Roller Coaster

Many sales professionals can display their sales by month for the year and see a really good roller-coaster ride pattern. They may even hit plan for the year, but a sales manager can never truly "count" on the sales professional's forecast or sales contribution on a regular basis. They have trouble managing their pipeline, delivering consistent proposals, and keeping activity levels stable. About the time they garner notice and a manager wants to send them to training, their numbers are up so they never quite make it to training, but they never quite become fully successful. By the time they have several months in a row that they miss quota and truly become a problem, they already come to the conclusion that they will not be successful where they are at and they are looking for another job. The Roller Coaster performance profile can easily benefit from training, because once they are presented with the repeatable, consistent, sales processes that are proven to produce stable sales, they can recognize the principles and easily begin integrating these processes into their sales strategies.

The Almost There

Next we have the group of people that hang out right at the "meeting quota" line. They are "almost there" when it comes to sales success. Every month, they work like demons, stress out the admin staff, harass their sales managers for all the "special exceptions" and generally take the most time to manage and maintain. Because they are on the very verge of being successful, a sales manager is actually convinced a little more coaching is all they need to succeed. A true analysis of their ac-

Continued on next page

counts shows a different story. The research indicates they are making marginal deals with questionable sales tactics and very little repeat business or relationship building. They are almost succeeding by sheer force of their sales skills and an extreme amount of work. They are often the first ones in the office and the last ones to leave. The Almost There performance profile is rarely seen in training, for two reasons. The sales manager is convinced they are just a few deals away from SuperStar and doesn't want to impede their momentum by taking them out of the field and the sales professional certainly does not want the distraction of training. They are firmly focused on man-handling the details of every sale and ramrodding their deals through the system by any means necessary to close the deal. Getting this person into the appropriate level of training can actually not only benefit the sales professional, but also the entire sales team for that office. Once the Almost There performance profile starts to make solid sales process deals, it releases a significant number of resources that had to be devoted to getting the previous marginal deals to close. Stress levels reduce and sales managers can work on coaching the other sales professionals on their team.

The Drowning Victim

Finally, the performance profile most often seen at training is the Drowning Victim. This is the sales professional that has almost no sales and they are being sent to training as a last ditch effort to save them from leaving the company, either voluntarily or involuntarily. This sales professional may be in the wrong career, have conflicts in the sales office, trouble balancing work and home life or a myriad of other issues that are preventing them from being successful. They seem to work hard but have no tangible results. They are usually more than willing to try going to training, more because it gets them out of the office and away from the issues that are causing their poor performance results. They may pick up some sales process techniques while at training, but even if their results change for a brief time, there is no lasting impact from training. The sales manager tries to provide help, maybe even riding with the rep and helping them through some calls or closing a deal for them, but their lack of results is disheartening and everyone around feels like they get dragged down with the sales professional if they try to help. A root cause analysis of the performance problem indicates the person knows how to do their job, so training isn't really the answer.

Summary

The top 20%, the SuperStars, need to be given the recognition they deserve and looked to as a role model of success. The Drowning Victims, the bottom 20% of performers, need coaching and help in a way that doesn't draw the team down into the dumps with them. The New Guys, those new to the organization, need a fire hose treatment of initial training, then a few months of truly targeted coaching, mentoring and encouragement to develop their sales style. The rest of the organization, the middle 60%, needs training specifically around solutions selling skills, relationship building and true competency in the solutions/products/services that make up the real value proposition of the company.

Performance Profile	Development Needs to Maximize Sale
New Guy	Initial Training, Intense Coaching/Mentoring
Rogue Super-Star	Recognition, Role Model Opportunities
Almost There	Advanced Sales Skills, Selling Solutions Training
One Hit Wonder	Advanced Sales Skills, Selling Solutions Training
Roller Coaster	Advanced Sales Skills, Selling Solutions Training
Drowning Victim	Coaching, Intervention, Performance Improvement Plan

Teresa Hiatt is the current Director of Solutions Sales Education at Ricoh Americas Corporation. In her eight years at Ricoh, she has traveled to Ricoh Europe, Ricoh Canada, Ricoh Latin America and Ricoh Asia-Pacific and worked with other sales education teams for the purposes of conducting research into sales training, setting global sales strategies and delivering sales training programs.

She is a member of the Board of Directors for the Professional Society of Sales and Marketing Training. She has also served on the Judges Board of the American Society for Training and Development where sales training programs from around the world are examined to help determine winners of the ASTD BEST awards.

Hiatt has served on Industry Panel discussions at national conferences with Gartner and CompTIA. She delivered a breakout session on sales training at the InfoTrends Office Document Technology Forum in Boston. She has written articles for Office Technology magazine on sales training.

As a Six Sigma Black Belt, she has conducted process improvement projects on training effectiveness and has had Return on Investment projects certified by the ROI Institute for Training.

The Essential Guide to Training Global Audiences

Book by Renie McClay and LuAnn Irwin
Interview by Julie Poncé

You are facilitating for the first time in China and everything went wrong from the minute you arrived at the airport: You were jet lagged, dinner from the night before didn't sit well, the shipped participant materials didn't arrive, the leader that was supposed to open the session didn't show, the English proficiency of the group was overstated and the ice breaker wasn't understood. Your PowerPoints that were fine at home turned into boxes and couldn't be used. It was a nightmare from soup to nuts. Your translator didn't understand what you needed; everyone was smiling and polite when you left but you aren't sure how much learning transfer there was. What went wrong?

Julie: How exciting to finally have an in-depth resource on global training and development. What made you write this book and how can we use this book?

Renie: *There are two major areas in which this book can be helpful: Training inter-cultural classes in the United States or in different countries. I have had the opportunity to do global training in Africa, India and Europe along with virtual-training for six continents. I have developed a lot of passion for global training and as I tried to learn more about it, I found plenty of resources about negotiating with other countries and cultures but not a lot of resources readily available for training and development.*

Julie: The book is divided into three sections: Tell us about that.

Renie: *The first section of the book has general information on training in foreign countries: translators, program design, presentations and insights for training any kind of international or global audience. The second section gets into the specifics on the regions of the world with the third section dealing with such things as: dealing with the unexpected, use of technology and other resources, how to globalize a training initiative for an organization. I presented this topic at The Chicagoland Leaders "Doing Business in Asia" Conference and the response was very positive. Lots of companies are looking for insights into how to roll out corporate initiatives globally and to do it successfully and inclusively.*

Julie: Each county is divided into "must-have" information and useful tips such as: Getting There and Getting Around, Program Design and Delivery, Logistics, Technical Requirements, Accommodations, The People, Preparation and Presentation. How many countries do you cover and why did you organize the information this way?

Renie: *There are over 30 specific countries plus the continent of Africa presented in the book. LuAnn and I looked at what information were the keys to ensure a successful training that met the objectives, and then what would be all the pieces that could break down along the way. For example: you can get there and not have the right technology or your design could be poorly suited for your different cultural audiences to learn.*

Julie: Have you and LuAnn been in all the countries you wrote about?

Renie: *No, we have not; however, we have over 60 Subject Matter Experts whom have contributed to the book, which we feel is one of the keys to the book's success as a tool (You being one of them, Julie). It was not about us reading information about a country or just about the experiences of two people. We interviewed people who had actually trained, designed training, presented or translated in many different countries.*

Julie: The section about Web Casts is invaluable. Give us a preview about that.

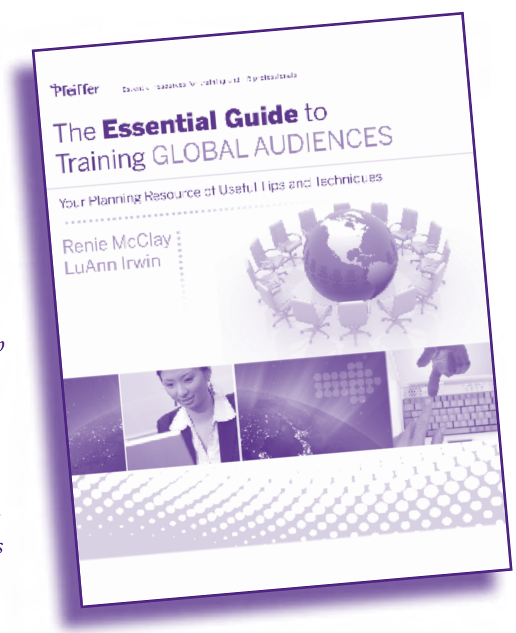
Renie: *One of the major changes over the past 20 years in training is that companies can no longer have face-to-face workshops as a solution to every training issue, and they are increasingly using e-learning or web casts to communicate information. Many web casts are a one-way sharing of communication with perhaps a space for a Q & A, but in most cases, it is not interactive. A lot of progress has been made and web casts can be very interactive and include exercises and follow-up to reinforce content. Webcasts make it manageable to reach — or teach — people around the world in a short time frame.*

Julie: This is really bringing web casting to another level and with the other useful tips you include on global training, our readers would be wise to have this book as a necessary resource for their library. Would you like to leave us with a global thought?

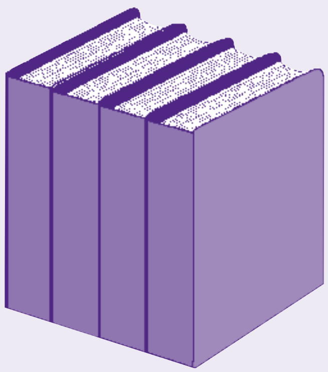
Renie: *There is a lot at stake when training a culturally diverse audience. Many times you don't really know if it is successful at the end. Just because people are smiling and are really nice to you when you leave doesn't mean that they really grasped what you were getting at. Therefore, planning and preparation is really the key. It is also helpful to be flexible and adventuresome and have the ability to change a training program to accommodate the comfort level of any group. This is extremely helpful to companies struggling with taking their US curriculum and sending it out around the world with success.*

Julie: Where can we get the book?

Renie: *You can get the book at Amazon.com — or, as they say, anywhere books are sold!.*



What Your Peers are Reading



***Costs and ROI*,**
by Jack Phillips –
Very short, easy read with many excellent examples to help you come up with great ways to measure the ROI of your programs.

***Judgment*,**
by Noel Tichy and Warren Bennis –
Learning about the different types of judgments leaders need to make to be successful. Judgment appears to be one of the keys that defines a successful leader. Tichy and Bennis interview a number of CEOs to examine this.

***Sales Training Solutions*,**
edited by Renie McClay and 10 other sales training contributors –
This book should be used as a reference for anyone interested in sales training. Each chapter reads like a consultation around sales training, and is loaded with ideas, tips, tools and sound thinking.

– ***Howard Prager***,
former CCASTD President

***High Impact Learning, Strategies for Leveraging Business Results from Training*,**
by Dr. Robert Brinkerhoff –
I like the perspective that if you bring focus and intentionality to training, you will have better results (and that those results are tied to business goals!). On the flip side, the strategy is easier said than done.

– ***Diana Oye***,
Co-Vice President of Programming for CCASTD

***Happy About Linkedln for Recruiting*,**
by Bill Vick –
I was hoping for tips on how to use Linkedln. This book is light on tips, but it showcases many different recruiters with contributions. This book is $60 and I picked up maybe 3 tips. If you are interested on information on this topic, I recommend a Linkedln Cheatsheet from jobmachine.com for $20.

– ***Renie McClay***,
Editor, Training Today

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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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