LEARNING

STRUCTURING YOUR ON-THE-JOB TRAINING

WHILE WORKING

PAUL SMITH
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ATD PRESS
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Preface: Waldinger’s Journey

The old saying is that “necessity is the mother of invention,” and The Waldinger Corporation would have to agree. It was because of a significant business need that the company took the chance of stepping into largely uncharted training territory in search of an effective solution. The gamble paid off; the company launched a program that rapidly took on a life of its own. That program, and the concept that built it, is the reason this book now exists.

Let’s start with a bit of history, to set the stage properly.

Harry Waldinger immigrated to the United States in his mid-20s. At the age of 30, this Austrian-born tinsmith founded our company in 1906. From the start, the company focused on building both a strong reputation and overall growth. Harry passed away in 1935, leaving his two sons to run the four-employee company. In 1940, they took a bold step by bidding on a job 10 times larger than they had ever attempted before. The risk paid off when the project was successfully completed and the company stepped into bigger and bigger projects.

The Waldinger Corporation continues to grow. It is now a full-service sheet metal, mechanical, and electrical contractor with a reputation built on projects in 42 states. Waldinger currently employs more than 2,000 professionals and exceeds annual revenues of $400 million. The company plans to continue to grow to become a billion-dollar company within the next few years. Exciting as that may be, pursuing, achieving, and sustaining that level of growth requires expansions in many areas within the company.

But who has time to expand parts of the company from within if everyone is focused on doing the actual work supporting the ability to expand? It can be a catch-22 that ultimately stifles the ability to grow. Of
course, this is where workplace talent development professionals come in. While there has always been a great deal of informal training taking place, it has only been in the most recent decade that the company explored the idea of having full-time dedicated staff members to provide training.

Initially, Waldinger employed trainers who worked to provide training as requested to various areas within the company. However, the company lacked a comprehensive curriculum and an ability to strategically coordinate training to achieve key business results. Training that did take place was isolated, resulting in disconnected and duplicated efforts.

Waldinger strives for excellence and efficiency in its project work. Leadership knew that they had areas for improvement in how they were approaching the training function, as well as how the training function could better support the company. So in more recent years, Waldinger changed the expectations of its training and development department. Its members went from being company-wide order takers to strategic resources whose efforts would focus on tasks with the greatest level of impact upon the business. The company’s structured on-the-job training (SOJT) efforts, and everything that spawned from the initial task, have flourished ever since.

**The Need**

When the company set its eyes on becoming a billion-dollar company—its strategy was entitled “Plan B” (for billion)—it also sought to identify potential obstacles to getting there. One quickly identified major factor was a lack of competent project managers to lead the project work the company would take on. Any individual project manager could only manage so many smaller or medium size projects at one time, and large projects almost always required a project manager to be assigned to that project and nothing else.

One way for the company to grow was to bid for larger and larger projects, just as Harry Waldinger’s sons did in 1940 to grow the business. But a lack of project managers to take on those roles could prevent the company from growing at the rate that it sought to.
The most common way for someone to become a project manager at Waldinger was to be hired straight out of college with a degree in engineering or a similar subject. These individuals started as project engineers, and they would begin their “path to learning” on how to be a project manager at Waldinger. Their education would consist of some classroom-type training internally, participation in third-party training sessions, trade association events, and OJT.

Most of a project engineer’s learning took place while they served under the wing of an experienced project manager. They worked on an actual project, often spending most of their time on the job site. This truly is the best venue to learn to be a project manager, because so much of the project manager’s duties are more art than science at times. Basic details of the job could be taught in a classroom, but the nuances and subtleties of the types of decisions a project manager needs to be able to make must be experienced in real-life situations to fully learn them.

But this experience-based learning lacked consistency. One project engineer might have a dramatically different experience from another based on a variety of factors: the type of job they were assigned to, the nature of the work they were assigned to do, and how much time their mentor project manager devoted to helping them truly learn. While some project managers would seriously seek to guide their project engineer through stretch goals, others might simply assign them the paperwork that they themselves preferred not to do.

Such inconsistencies within the largest portion of the project engineers’ learning, combined with the rather haphazard approach to exposing them to other forms of training, meant it took quite a bit of time for most project engineers to develop the level of knowledge, skill, and competency that would pave the way for their promotion to project manager. This process could take about five to seven years from when a project engineer started with Waldinger, until they were deemed to be a competent project manager who could oversee a multimillion-dollar job.

That same timeframe aligned with goals in the company’s “Plan B,” creating a bottleneck for the company. To see growth results within the
timeframe, it would need to reduce the ramp-up time of competent project managers to three to four years without sacrificing the quality of their education. Quite a daunting task, some might say.

The Solution

While there are no silver bullets that can miraculously fulfill every need—in training or otherwise—The Waldinger Corporation discovered that developing its own structured on-the-job training (SOJT) program had the potential to resolve many of the most crucial issues. For Waldinger, this distinction from OJT was where the impact was truly felt as it sought to train its project engineers to become project managers.

Adding structure to its OJT program meant identifying 430 different measurables—items that could be observed and validated by the mentor project manager to confirm competence. The goal was not to simply make a checklist of things that the project manager and engineer discussed, but to produce competent project managers in almost half the time it had previously been done.

The Waldinger SOJT program for its project engineers was built on the concept of the learner demonstrating consistent competency on a single, measurable item before their mentor project manager would sign off. The program also ensured that each project manager would be equipped to see exactly what their new project engineer had already learned and demonstrated competence in, and what areas they still needed to address. This information would allow the project manager to strategically target work assignments for the project engineer to continually provide them with new learning opportunities.

Another significant benefit of creating an SOJT program was that much of the activity that was already taking place could continue to happen. It wasn’t that the efforts were bad; they were just disorganized. Once the structured approach was started, Waldinger was able to quickly determine which existing elements would still provide the results needed. Those who braced themselves for a wholesale change to the training programs were
pleasantly surprised to find that what was rolled out to them remained very familiar.

Waldinger now has a program that spans the full learning needs of participants. For example, when a new project engineer is hired and placed on the path of becoming a project manager, they are provided their personal SOJT tracking tool in their first week. This is quickly followed by them being assigned to join a work project under an experienced project manager’s guidance, who will serve as their SOJT mentor while on that project. The learner and the mentor sit down and go through the SOJT tracking tool together, flagging the measurable items that the mentor believes the learner will be exposed to on the project.

Because Waldinger’s SOJT tracking tool for project engineers contains more than 430 measurables, it is a given that the project engineer will not accomplish all of them—or even most of them—while working on any one project. It will realistically take them 2.5 to three years to complete the bulk of the SOJT measurables. During that time, the project engineer will have worked with multiple mentors on different projects to gain a broader level of experience.

But as that engineer moves on to new projects, their new mentor can easily see what they have demonstrated competency in, as well as which areas they still need to be exposed to. No longer does Waldinger’s SOJT mentor need to guess at what to do with their newly assigned learner; they can zero in on specific areas of growth and development they truly need. Additionally, they can ensure the learner feels like a contributor to the project by assigning them responsibilities based on the areas they have already demonstrated competence in.

The learners are in the driver’s seat of the sign-off process. They are given the complete SOJT tracking tool right up front. They are responsible for scheduling the initial meeting with their mentor to discuss measurables to target. And it is their responsibility to approach the mentor when they think they have achieved competence in a measurable. The onus is placed solely on the learner to keep track of their progress and development. They own it and are expected to manage it.
The glue that helps hold all the pieces together is Waldinger’s professional development plan efforts, which are spearheaded by a development plan coordinator. This is one of many hats worn by Waldinger’s director of safety and employee development, who schedules one-on-one conversations with each SOJT learner every 45 days. In these discussions, learners will be asked to share details about the competency sign-offs they have received since their last meeting and what measurables they plan to achieve during the next 90 days. If the learner is not receiving sign-offs, the development plan coordinator will reach out to the mentor to determine the cause. This may result in the learner receiving additional training on needed skills, or even moving the learner to another project where they can continue to advance.

The training department provides formal training in the classroom or through in-house-developed online courses. This training supports the learner by providing base knowledge or skills that prepare them to pursue the SOJT measurables, or content that may help address any knowledge gaps the learner may have as determined in the development planning process.

More recently, Waldinger has added a robust internship program for project engineers. The program uses a scaled-down version of the SOJT program for project managers to guide the interns’ experience. The intent is to show them what a career at Waldinger might have for them, including the structured path for professional development. As a result of the program, prospective employees have chosen to work for Waldinger rather than competitors who would’ve paid them more—all because Waldinger clearly spelled out its commitment to help them pursue their career.

**The Result**

Waldinger’s initial business need was to reduce by half the amount of time it took for a project engineer to become a project manager capable of taking on a major construction project, without losing quality. Waldinger has achieved this goal through its SOJT program. Feedback has been
extremely positive from learners and mentors; having the SOJT tracking tool filled with measurables eliminates a great deal of time that otherwise would have been wasted. Some project managers have expressed surprise at how quickly some learners can advance through measurables; they probably were able to do so previously, too, but without a list of targeted tasks or a way to track them, there was no way to monitor such progress.

Waldinger’s SOJT program for its future project managers helps with recruiting, supports the efforts of the mentors, enables leadership to make personnel decisions, provides the training department with clear guidance on curriculum needs, and makes the professional development process move smoothly. It is easy to see why Waldinger decided to develop SOJT programs for many other roles within the company—a process that is continuing!

But it’s important to note that this is just one company’s SOJT success story. Your company or department might—and should—take what has worked for The Waldinger Corporation and tailor it to your identified business needs, employees, work environment, and industry. There is no one-size-fits-all solution to SOJT, though an SOJT program can provide an extremely flexible environment within which to create targeted solutions that can meet your organization’s unique needs. Throughout the rest of this book, we will look at how to create and launch an effective SOJT program and also highlight what other companies and learning and development professionals are doing to make SOJT work for them, as well as the additional benefits they have seen from their SOJT programs.
Adult learners require relevance for training content of any kind to truly stick. If they do not believe that what they are learning applies to their daily duties, the odds of them retaining or applying the new knowledge are slim to none—which defeats the whole purpose of your training initiative.

In an “off the job” training situation, such as a traditional classroom, learning comprises concepts, ideas, and suggestions for when the learner gets back to their job. But on-the-job training (OJT) programs, particularly when buoyed by a structure, provide guided and targeted work-based experiences that allow learners to be trained on tasks in real time, in production environment situations where relevance to daily tasks is clearly identified.

Learning transfer is a huge topic in the training industry, whether the topic is leadership development or how to use new data entry fields on an application screen. The challenge faced by traditional classroom instructors and online course developers is how to ensure what is learned in training can be readily applied back at work. Because OJT programs place the training opportunities directly within the workplace, the issue of transfer is diminished. Learners more easily make the connection between what they’re learning and the work tasks at hand.

However, this doesn’t mean an OJT program will render training courses irrelevant. In fact, there is a symbiotic relationship between OJT and off-the-job training in that formal training can provide a solid foundation of basic knowledge on which the experiential learning of an OJT program can build.
What Is Structured On-the-Job Training?

On-the-job training (OJT) and structured on-the-job training (SOJT) are very similar, and they do share some overlapping ideas. Both concepts recognize that there is value in learning while doing. Both acknowledge the role of receiving guidance during such experiential learning efforts. And both support the notion that a formal classroom often may not be necessary to learn.

However, the two terms are not equal or interchangeable. Where they differ is the manner in which they conducted. A typical OJT program involves assigning a new person to work alongside an experienced employee. The new person is urged to “do everything they do,” and the experienced person is instructed to “show them the ropes.” And much of the time that is the extent of the guidance received by either party in the OJT program. Those who survive it can become very productive employees and exhibit strong confidence in the knowledge they attained. But many who are put in such programs find it difficult to succeed—and do not last long in those roles.

An SOJT program provides more guidance, focus, and direction for those participating. It is built on the concept of identified measurables, which are learning tasks that produce something that can be observed and evaluated. It also includes tracking and accountability elements to ensure that learners progress. And lastly, when properly implemented and monitored, it can provide leadership with information to use when determining employee advancements or assignments, because SOJT success involves the learner documenting demonstrated competency, not just memorizing information.

The Importance of SOJT for the Future of Work

Because an SOJT program turns the workplace into a classroom, the learner is exposed to real-time scenarios encountered by those doing the job. This equips them to anticipate the role’s demands and more quickly develop the wisdom that experience doing a job can bring. As the needs of work continue to evolve, the organization will feel the need to change
as well. A well-designed SOJT program not only prepares participants for doing work at the moment, but also instills critical thinking skills to adapt more efficiently to changes as they come.

Much has been written and said about Millennials in the workplace, but one factor that seems to define this generation of employees is the amount of personal control they seek. Millennials want to take things into their own hands, especially when it directly concerns them. A strong SOJT program is ideal for companies preparing for the rapid shift of generations in the workplace; it will give Millennials a learner-driven training program that is fully adaptable to their individual needs.

How SOJT Can Work for All Jobs and Roles

It may be easy to see how an SOJT program could work for The Waldinger Corporation and other companies in the construction industry. Clearly this type of competency-based, hands-on learning experience fits well with those working in skill-based jobs. But the basic format and functionality of an SOJT program transcends industry boundaries.

Any role with an element that is best learned by actually doing is a candidate for an SOJT program. Which means it could be applied to almost any job, at any level, with any entity, regardless of size or geographic location. Whether it is training for a construction job, an assembly line job, a call center job, a nursing job, a food service job, a transportation position, or nearly any other labor-centric position—if the role has specific expectations that can be observed and measured for competency, creating an SOJT program to support learning it can be done.

This even applies to higher-level concepts that we train for, such as leadership or coaching. These types of positions generally rely heavily on the individual having educated intuition and learned instincts, neither of which can be successfully taught in a traditional classroom or an online course. These skills are honed through practice in a controlled environment—exactly the context an SOJT program creates.
About This Book

Some write books because they have a desire to influence their industry or culture. Others write books that grow out of previous efforts, such as speaking events or presentations. Yet this book was born solely from a desire to share a few nuggets of information that have proven valuable, so that the reader may benefit from that knowledge, too.

The purpose of this book is to help you develop your own vision for what an SOJT program might look like in your organization. It will help guide you through the necessary thought processes to help ensure success. As a result, I will be asking and answering a lot of questions, hopefully anticipating most of the ones you might already be worrying about.

But Learning While Working isn’t just about what one company has done, nor is it a sharing of one person’s opinions regarding SOJT. I filled this book with information, input, and examples from a diverse group of interviewees. While you might spot useful tidbits from those who are also in your field or a closely related one, ideally the big takeaway will be that the SOJT concept is not limited to any industry type, company size, or level within a company. These examples show that the principles of a truly structured on-the-job training program can help work wonders where they are properly applied.

The benefits are not just in improving how learning happens, although that would be an impressive achievement on its own. The benefits of a strong SOJT program extend to hiring and retaining employees, creating a framework for developing a comprehensive curriculum, and even supporting the culture mash that results from mergers and acquisitions. In many ways, a well-designed and developed SOJT program can become a company’s workplace talent development answer to a Swiss army knife!

Here’s a brief chapter-by-chapter breakdown:

- Chapter 1 will explore the foundational link between an SOJT program and business needs.
- Chapter 2 will pull back the curtain and explore what SOJT really is (and even what it is not).
• Chapter 3 will look at the benefits of doing an SOJT program.
• Chapter 4 will show you how to develop an SOJT program, beginning with investing the time to properly gather broad input.
• Chapter 5 will get into the nuts and bolts of what makes an SOJT program really work.
• Chapter 6 will get to the “crown jewel” of an SOJT program: the tracking tool.
• Chapter 7 will discuss mentors, a crucial part of the SOJT program’s success.
• Chapter 8 will address implementation of an SOJT program.
• Chapter 9 will look at the very important step of ongoing maintenance and enhancement of the SOJT program once it has been launched.

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Paul Smith
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There is an old joke about a new minister at a church who kept delivering the same sermon each Sunday after she was hired. When the church elders finally confronted her and asked when she would be moving on to a new sermon topic, she replied: “As soon as I see you start doing this stuff, we will move on to something else.”

Those who have been in the workplace talent development profession for any length of time (even just weeks) have likely already heard on multiple occasions about the importance of a good needs analysis up front, prior to developing any type of training. It’s basic common sense: Know what you need to accomplish before you start doing it. Yet it continues to be one of the most overlooked steps when training is planned. It’s as if needs analysis has been relegated to the notion that it is so basic that it isn’t really necessary. But nothing could be further from the truth. Launching any project, training-related or otherwise, without a clear understanding of what is truly needed is foolish at best; at worst, it is an intentional misuse of human capital and financial resources.

In many cases, this happens because the training department has become a reactionary order-taker. The training it develops is solely in response to requests—and it assumes that the request is the identified
“need.” But frequently that need was identified by a person who, while good at overseeing business processes, may not have the skills to truly identify the problem that needs to be addressed.

So it will come as little surprise that some will also assume they can skip over the process of confirming need when developing a structured on-the-job training (SOJT) program. They think they already have a grasp on why this program is the best solution, so why bother digging any deeper into it? But the role of a true talent development professional is to continually validate two basic things: Are we sure what the need really is? And are we certain that training is the solution?

Basic as these questions may sound, there is actually tremendous depth to them. Pausing to fully consider them up front, and ensuring that their answers are solid, can prevent a dump-truck load of heartburn and headaches down the road. If this is true for a training class, which will happen in an established time and then be complete, imagine how much more important it is for the development of an SOJT program, spread over several years and involving many, many individuals.

Define the Existing Need

The basics of building an SOJT program mirror in many ways the development of any type of learning initiative, according to Jen Carolan of ChangeStorm Consulting. You need to understand why the learning initiative is being planned, which involves asking a few fairly standard questions to ensure you’re on the right track. She suggests asking:

- Are you rolling out something you don’t know because it’s new?
- Are you training a new employee, as in all the content is new to them?
- Is there a regulatory- or compliance-motivated change that is prompting training?
- If the training request is motivated by a merger, are there new culture considerations that need to be addressed, too?
- Is there a skills gap simply because existing employees are not motivated or tracked, and training isn’t the need?
Moneris, a Canadian financial technology company, uses its internal business partners as its eyes and ears within the organization, says Mary Kalkanis, director of learning and leadership. Doing this helps the company stay on top of what needs may arise in specific areas of the company.

“For example, from a leadership development perspective, we partner with our team in organizational development so that as they do talent reviews, we are gathering themes from those talent reviews,” says Kalkanis. “They tell us what programs we need to focus on to build lacking capabilities. So that helps us from a needs assessment vantage point. It’s not the only data point we use, but it is an important one that comes from all parts of the business.”

So what could be the risks of not going with an SOJT program, if the identified business need seems to point toward it? The risks could include what Dawn Mahoney, owner and principal at Learning in the White Space, calls “making stuff up.” It’s fair to assume that on-the-job training or learning is going to happen, no matter what. “When the program isn’t specific and handled intentionally, the so-called shortcuts and less desirable ways of doing things will rule the day,” adds Mahoney.

Too often talent development professionals lean on the belief that practice makes perfect. In fact, sometimes we believe throwing someone in the deep end of the pool will allow them to experience a lot of practice and thus make them a good employee. But the reality is that only perfect practice makes perfect; bad practice creates bad habits. Or, as Rowena Crosbie of Tero International believes, “practice makes permanent; that’s how bad habits are formed and they are very hard to break.”

For those who choose to start down the SOJT path, one of the most common motivations is the awareness of the significant role that OJT plays in an employee’s ability to learn both the details and the nuances of their role. But just having that awareness is not enough, even though that may be the point where an examination of need comes to a stop in some organizations. It is important to probe further—to identify what the OJT experience needs to look like to produce successful results.
But fortunately, there is no magic needed to succeed with this process. In fact, it is surprisingly basic, and yet powerful when done correctly.

For example, James and Wendy Kirkpatrick, building on the model of Don Kirkpatrick, have shown how their four levels of evaluation, used to determine the success of training-related initiatives after they have been completed, can also be flipped to be used as an excellent needs assessment tool up front. In fact, using the same success criteria to measure need at the outset is a great method for ensuring that the needs analysis and evaluation strategy are in sync.

**How Is the Need Observed?**

Whether developing a single training class or an entire learning program, you must always ask why: Why has this been determined to be a need? Or more to the point: How was the need determined? It is not uncommon for entire training initiatives to be launched based on a competency gap shown in a small number of employees. It is important to confirm that the issue to be addressed is not better solved through targeted training rather than an entire new program. A strong SOJT program can effectively pay for itself, but only if it truly is the direction the company needs.

For example, if the answer is a lack of skilled workers to fill specific roles in which they need to both think fast to adapt to a variety of situations and recall facts or information, then SOJT may provide a solution. But what if the organization’s need is to reduce turnover, attract higher-quality employees, establish greater uniformity in how job duties are performed across an organization, or even break down language barriers caused by an increasingly diversified workforce? Well, an SOJT program can provide a solution for such situations—chapter 3 will offer examples of organizations whose SOJT programs are delivering those exact added benefits today. However, just because SOJT can be a solution in such instances does not mean it automatically should be considered the solution to every such situation. Issues related to turnover could be caused by a wide number of other factors that have no connection to how employ-
ees are trained, in which case, investing in an SOJT program to address turnover likely will not be successful.

David Tiensvold, workforce development programs manager with CoorsTek, which manufactures technical ceramics, sees the company’s SOJT programs as a means of promoting uniformity in similar processes and systems use across the company. “SOJT is being used in some plants today, but it has not been universally adopted or implemented in all the plants,” says Tiensvold. “This can be frustrating for a leader who moves to a new plant and has to determine the learning culture of the new plant. For certified workers, this may even mean when they are loaned temporarily to another plant—they may need to get the certification all over again at the new plant they have been loaned to.”

Tiensvold says he finds it very difficult to standardize some training for the organization due to the varied requirements of each plant, and even the varied equipment and processes within a plant. But their SOJT efforts are moving them closer toward that goal because the SOJT programs are built upon consistent, agreed-upon standards. So the process of developing uniform content for training actually becomes an influencer on the organization itself, helping promote standardization.

For Bruce Wilkinson, director of learning and development at Allan Myers, having established, observable competencies was at the heart of the company’s efforts to build an SOJT program. “The process was about building a template we could use with key positions,” says Wilkinson. “We needed to define competencies, the level of proficiency within a competency, and what those key skills were.” Once that was developed, Wilkinson says the company set out to create a library of materials and resources that would support defined competencies.

“This is a competency acquisition program: Can they do the competency at the level that was suggested as the minimum?” he continues. “It is not about checking a box. In our documents there are no boxes to check. We don’t make a hard connection between course taken equals competency acquired. We determine competency based on observation.”
Regardless of your industry or the learning population to be addressed, SOJT measurables must have a direct connection to support for an observable, definable, recognizable need of the organization. The amount of investment required to build a serious SOJT program in both time and labor dictates that there must be a sufficient return on investment (ROI) identified long before any development begins.

In The Waldinger Corporation’s example, found in the preface, the need identified was a deficiency in the number of competent, skilled project managers, which limited the company’s growth plans. The solution was to create a means of training project managers faster, but without sacrificing the quality of the knowledge gained—new hires needed to be able to step into those roles faster. That is an example of a clearly defined and measurable business need, which established a very clear direction for the training need—for which an SOJT program was the solution.

At Allan Myers, Wilkinson indicates that the motivation to build SOJT programs was largely a response to lower levels of qualified employees and how best to deal with that problem. “We have come up with methodology to do so, and started our work with developing our foremen to make them better at what they currently do, and prepare them for advancement. Next, we are addressing our equipment operators, pipe layers, truck drivers, and carpenters. We fully understand part of that will involve planning ways to train people who have no background in or knowledge of either the specific skill or perhaps even the industry overall. That is where we will likely really dig down into some basic construction curriculum and include some basic life skill elements, too.”

Brad Allred, global training manager for GE Healthcare HyClone Cell Culture, Life Sciences, says that the organization’s need was more employees. But because it’s in an industry highly regulated by the FDA, it needed to be able to not just identify and hire quality employees; the employees needed to also become qualified as quickly as possible.

“We have a tiered training approach, which starts with entry level. Once the learner completes that level they move up through three skill-oriented levels. Once they have completed all three skill levels, they are then
able to choose whether to pursue a manager path or one of two specialist emphasis paths,” says Allred. And because of the identified urgency of staffing needs, the SOJT program was designed to take only 18 months, on average.

At the Pella Corporation’s window and door manufacturing plant in Carroll, Iowa, the identified needs were also related to a need for skilled workers, but there were other, more practical needs the company hoped to address as well, says Toni Delp, a quality technician and trainer. The company took a holistic approach to identify its needs and lay the foundation for its SOJT program.

A couple of years ago, Pella took a step back and looked at the overall training program, especially the onboarding process. Turnover rates were high due to people not feeling they understood what the job entailed during training, and so when they hit the shop floor, they would last a week or two before giving up. “It was a costly process to have to keep churning new hires through a full training program, only to have them leave shortly after completing,” says Delp. “We not only had lost all the investment made in that person, but we again had a vacancy which needed to be filled all over again.”

Deciding that something needed to change, Pella brought together trainers, on-the-floor managers, and frontline workers to seriously look at what they could do better. “One of the key things that came out of that was that we needed a program that allowed us to do less talking to them, but which gave more opportunity for letting them do the work, with microlearning explanations at various stages rather than presenting all the content to them at one time,” says Delp. “This would allow Pella and the new employee to each know sooner if the position was going to work for them or not.”

For CoorsTek, the journey started with the concept of having a training program that would address the minimum competencies expected for each role. But as David Tiensvold shares, now that the basic foundation exists, the company is already looking at ways the SOJT program can be enhanced to further address its needs.
“Currently a new employee enters the training program that is geared to their role. Some have more classroom time than others, depending on the base knowledge they need. Different departments have standards for the processes they encompass, which will include guidance such as how many times a person has to perform a task before competency is confirmed. Some of these requirements are also driven by customer input, as well,” says Tiensvold. “Looking ahead, we are trying to determine how to merge three concepts into an overall SOJT program: acquiring the basic knowledge, providing the experiential opportunities, and earning all internal or industry-standard certifications required for the role.”

According to Tiensvold, this new program will mirror an apprenticeship program model. Training will focus on what learners need for each specific role or level, and they’ll need to complete each successive level to achieve the next one. These adaptations are a result of recognizing the dual need to adapt to variations found between, and even within, each of the CoorsTek plants, as well as a longer-term goal of seeking more ways for consistency and standardization where possible.

**Is Training the Solution?**

As basic as the question may be, it is important to know that the identified need can be at least partially addressed through a greater focus on how employees are trained. Keep in mind that at its core, SOJT adds a layer of organization and accountability to efforts that may already exist. This is why SOJT in and of itself will not be the solution if training alone cannot fix the problem.

One great tool that anyone thinking about resolving issues in the workplace should use is The Performance Thinking Network’s Six Boxes Model. This model identifies six distinct areas within an organization. The organization can use these areas to categorize every issue it faces and determine what combination of behavior influencers will produce the desired changes in behavior (Figure 1-1). When an area of need is identified, it is often automatically routed to the training department with
marching orders to develop training to fix the problem. Yet according to the Six Boxes Model, training is only a 1 in 6 solution, applying only in box number 4 and its focus on enhancing skills and knowledge.

Figure 1-1. The Six Boxes Model

![The Six Boxes Model]

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In many cases the solution may have nothing to do with training, but instead point to other factors which may need to be addressed, such as expectations and feedback, tools and resources, or capacity-related issues of selection and assignment. Each of those are operational issues that the company would need to address. Of course, if there are any changes made as a result of addressing those areas, it may be possible that everyone’s knowledge and skills would need to be updated—at which point the training team can definitely help. Motives and preferences remains an area that is controlled by the individual and can at best only be influenced by external factors. However, even though training cannot directly affect motives and preferences, training can be extremely helpful as an influencing tool to address it.

In the end, just because someone, possibly in a leadership role, decides that a training solution would help a situation doesn’t make it true. And
an SOJT solution is a significant undertaking. Launching development of such a program without first making sure it really is the correct solution would be an irresponsible abuse of the organization’s resources.

Anticipate Future Business Needs

Another common pitfall for those developing training that can negatively affect development of an SOJT program is designing training to meet the very specific, current needs of the organization, but failing to plan for expansion or growth.

Think of a business that has seen a lot of growth, to the point that it has had to double up people in office spaces. It decides to acquire a new facility that will allow for expansion, so all employees can have individual office spaces. Everyone is happy about this change; however, once they’ve settled into their new offices, there are only five remaining empty office spaces. How quickly will those fill up, placing the company right back in the situation it was in? Such is the risk of developing something new that meets the needs of today, yet does not anticipate the needs of tomorrow.

A robust SOJT program should easily allow for expansion, if it has been correctly developed up front. CoorsTek provides a perfect example of this. Its current SOJT program had a very traditional focus of simply teaching minimum competencies to step into specific roles. But it is now building upon the success of the current program to grow it into a broader program that also recognizes and incorporates variations beyond the minimum competency expectations. It is not looking to end the current program, nor does leadership think they are starting at square one. On the contrary, the stability of the company’s existing SOJT program is allowing them to focus on next-level planning, which revolves around newly identified business needs.

A properly developed SOJT program will consider the identified immediate needs of the organization. It will also incorporate logical next steps in the growth of the roles being addressed, in addition to expected growth in the company overall.
Test-Driving an SOJT Program

Karee Vernon served as a client success manager (CSM) with Cornerstone OnDemand. She had the privilege of being the first pilot subject for an SOJT-oriented onboarding training initiative for Cornerstone’s CSMs.

For her first 90 days, Vernon was provided information to help her understand the company, its products, and the customers she would be working with. She was also assigned a mentor, who was her trusted point of contact for everything from answering operational questions, to introducing her to people, to understanding the organization’s processes. The program then shifted to focusing on Cornerstone’s available systems. And finally, the emphasis shifted to working directly with clients. Each step included guided practice opportunities. After those first three months were up, Vernon began to “fly solo,” but her mentor remained in touch, even when onboarding was completed.

Prior to this program, Cornerstone’s approach was not unlike most entities who say they have an OJT program: Much of the responsibility was placed on the hiring manager’s shoulders to direct their employee’s development and learning opportunities. This caused a great deal of inconsistency in what learners were exposed to. Even with the best of intentions, managers still had their regular jobs to do. The SOJT program takes the onus off the manager and recruits the mentor as a partner to the learner and the manager.

But it sounds like Cornerstone is not content with just having improved the quality of its onboarding by using an SOJT approach. Now it’s planning for the future, and sees its SOJT program as being a key element of its growth. “We have just started the process of taking the program that I went through and looking at applying it across the company,” says Vernon. Cornerstone has four tiers of CSMs; Vernon work with the tier that supports the company’s largest customers. “They believe that the SOJT framework they created for my level can apply to all tiers. Content will change based on the tier level, but the SOJT framework used should translate effectively to each of the other levels.”

Everyone knows that businesses have to change and evolve, regardless of their industry, size, or reputation. Failing to stay current with or
ahead of others in their industry may mean losing market share, customers, and ultimately the entire business.

Yet when it comes to discussions related to training topics, it can be very easy to feel accomplished when a training initiative resolves an immediate issue. And while such a success certainly is something to celebrate, if that is the limit of what has been developed, then the benefits will quickly diminish. This holds true for an SOJT program if it is developed with limited ability to broaden its scope and expand to respond to future changes and growth.

This means those in the training function can make a name for themselves as true business partners through wearing their internal consultant hat. Rather than just responding to a request and developing a training program with limited application, they have the chance to demonstrate how investing sufficient time to build a solid SOJT program is in the ultimate best interest of the business—both in the short run and with a forward-facing approach.

Consider Pella Corporation’s SOJT program. While it took a significant investment of time and the involvement of many different people to create, the company is seeing payoffs in many areas. According to Toni Delp, Pella saw a noticeable decrease in turnover due to achieving a better understanding of what to look for in solid employee candidates, and because the SOJT program has significantly helped support an increasingly diverse workforce. Rather than sitting a new employee in a room to listen to an instructor talk to them all day for multiple days, the SOJT program allows the new employee to be exposed to bite-sized topics with minimal verbal instruction, with a greater emphasis on demonstrated, real-time skill and job-aid-supported, hands-on opportunities. This approach has proven to be exceptionally helpful for employees whose first language is not English; they had previously struggled with the heavy emphasis on verbal instruction (all in English) and limited hands-on opportunities during training. While this was not the intended main focus of Pella Corporation’s SOJT program when it began, it’s an example of one of the additional benefits that a strong SOJT program can provide for the organization.
Tie-In to the Company’s Vision

Of course, one of the best bits of advice for any training practitioner is to connect the training they are doing back to their company’s mission statement or goal statements. Frequently, these refer to the value of employees, the importance of ongoing development, and a commitment to building from within. These are all good elements for training efforts to be linked to.

It is not as common for training efforts to be linked to the company’s vision. This is because a vision statement describes a big-picture view of where the company has been, where it currently is, and where it sees itself going. Most training programs—especially individual training programs—are designed to focus on one point in that spectrum. Focusing on just a snapshot from one milestone moment in the company’s overall vision makes any such attempts to link back to it seem like too big of a stretch to be taken seriously.

But the company’s vision needs to be front and center when developing an SOJT program, because being able to connect the dots between where the company currently is to where it wants to go should form the backbone of a well-designed SOJT program. In fact, a robust SOJT program may be one of the few approaches to training that really can link to and truly support a company’s vision.

When The Waldinger Corporation laid out its vision to pursue becoming a billion-dollar company, it looked at what it was going to take to achieve that. It also identified what stood in the way. A lack of competent project managers was going to limit its ability to grow, so its SOJT program was developed to provide faster, higher-quality training specifically to support the company’s vision for where it wanted to go. The measurable documented in the SOJT program also focused on future competencies for project managers, even if current project managers were not knowledgeable in all those areas.

Chapter Wrap-Up

No matter how effective or well-designed an SOJT program is, if it is not built on established business needs, then it will not succeed. One
major obstacle to determining if SOJT really is the solution is making sure everyone involved defines SOJT the same way. Ensuring everyone has the same SOJT vision is fundamentally important to the program’s ultimate success.