FinancialTrainingSolutions
search. select. | connect ®

7 Steps to Planning your Training Calendar

"At the end of every year most Learning & Development teams start the process of planning for the upcoming year. Many start the process with a number of new and inexperienced members. "

It's never too early to plan your training calendar for the upcoming year. With all of the upheaval we've suffered in the past two years, the new year is probably going to be uncharted territory for most training organizations. But with a little planning and lots of flexibility, you can create a calendar and training plan that suits your organization very well.

In this White Paper, we will look at the seven steps you can take to plan your annual training calendar.

High Level Assessment

The first step in planning your training calendar is to take an assessment of the highest levels, including your organization, the industry in which you work, and the market in general. Hopefully you've had a finger on the pulse of all of these things all year, but now is the time to analyze closely.

At the organizational level, plan a meeting with your executives or planning committee. Find out about the projects and plans for the coming year. Is the organization going to introduce new products or change processes in a big way? Or, is the status quo working in the new financial environment? Find out what the executives are focusing on and attempt to build a program around this. For example, are they focusing on simply staying afloat, or is the focus going to be on achieving a particular goal? How badly has the organization been effected by the financial meltdown of the past two years? And how is the team planning to fix these problems? Depending on your organization type, you may get a full answer to these questions-and have plenty of material with which to go back and plan. Or, you may get answers that just point you in one direction or another. Either way, your job is to ensure that your department can meet the need.

Next, look at your industry in general. How are organizations similar to yours coming out of the economic downturn? Are they introducing new products, attempting to make a profit, or have they been minimally affected? Are these closely-related organizations hiring, firing, or freezing in the workforce? Why are they taking the actions they are taking? Many times, you can find this information by simply conducting a search on the organization.

Or, you may have a network of people who can help you. What is the outlook for the industry? Again, you can usually find good information by doing some simple research. But all industries tend to have 'followers' in the news-and yours is probably no exception. You can even peruse industry publications to get a good idea of what's going on. But whatever you uncover, begin to ask yourself if your training organization is ready to meet the need.

Along these lines, you should also be aware of what is happening in the market in general-and which of those market movements may affect your organization. You can also look for forecasts that may have an effect on your individual organization. If you're not sure, use or build a relationship in the financial areas of your organization. Many times, people are happy to share what they know.

Once you have made this assessment, open a communications 'pipeline' with your executive sponsor and team. Let them know that you are seeking information so that you can function as a partner in the coming year. They should know that your goal is to help the organization meet its goals.

Another good idea is to share your assessment with key members of your own training and development staff. Since you'll be building their calendars and projects from the assessment you've just undertaken, they deserve to know what is coming down the road. And be sure to remind them (and yourself) that this is only a basic roadmap, that at this point nothing is set in stone. And, as usual, be aware that anything can change at any time.

This initial analysis shows your executive team as well as your training and development team that you are ready to help them plan for the upcoming year. But, the information you gain will help you plan your resources, as well. The next step is to assess your own operation.

Assess Your Operation

The past year has been tough. Some organizations are still sifting through the wreckage, so planning for year may be a difficult undertaking. If you've already assessed the organization at the high level, it's time to assess your training and development organization. Your overall goal in this candid and realistic assessment is to determine if your department is poised to meet the overall needs of the organization as it moves forward in an uncertain environment.

Whenever training managers plan, the first, and most obvious, point is the budget. What kind of budget are you working with? Is it a pro-forma budget that is constantly changing, or is it static? Is your budget bigger this year, or smaller? Is it exactly the same or do you simply not know yet? Or perhaps your budget year doesn't begin until the middle of the year. Regardless, you have to know how much money you're dealing with. Also, take a look at how your dollars were spent in the last couple of years. Are there line items that are going to change? Do you need to transfer money from one area to another in order to meet the needs of the upcoming year? One of the other big concerns with budgets is the idea of having to ask for more money. If you have to ask for more money, do you have the "ammunition" to back up your request? Take some time to contemplate and analyze your budget.

Next, take a look at your infrastructure. What is the state of your Learning Management System? If you are anticipating an addition of online training, can the LMS handle the influx of courses and participants? Is the organization's bandwidth big enough to handle the influx? Do your online designers have the tools they need in order to produce courses that will run well on the LMS and its technological infrastructure? Consider the fact that you may have LMS features that are not up-to-date. You may need to discuss an upgrade with your vendor. Don't forget about physical infrastructure. Do you need more or less classroom space, materials, or office space? What does your original assessment tell you about the physical infrastructure?

Moving on, you'll need to examine your personnel. Is your current staff enough to meet the upcoming need? Or is it, unfortunately, too big to handle what is coming down the road? If you are looking at big changes in the way your training department functions, look at the existing staff to determine if anyone can be cross-trained or cross-utilized. For example, some training professionals are equally good at design and delivery-does your staff need to take dual roles for the time being? On the other hand, you may need to pull people out of one area to beef up another. One of the other areas training departments deal with is the idea of specialization. Do you have staff members that are currently "at large"? Can these staff members be dedicated to one area for the upcoming year? Be sure to ask yourself all of these questions before moving forward in your planning process.

What is the state of your design and delivery methods? For example, do your instructors have the necessary expertise to deliver the pieces that are going to be necessary in the upcoming year? Are your instructors in need of being trained as “facilitators”, or are they adaptable enough to roll with the punches? In the area of delivery, consider which pieces of current classroom training can be moved to online formats in order to free up additional resources. But, when you do this, be aware that a transition like this will use resources in the design and development phase. Are your course designers working in a vacuum, that is, are they prepared to design formats and methods that match the upcoming year in audience and technology?

The first key in the assessment of your own training organization is that you must be candid and realistic. The second is simple: do all of your analysis items point to the ability to support the organization in the upcoming year?

Once you’ve looked at these two points, you’ll be ready to move to the third step: benchmarking.

Take the Time to Benchmark

We've briefly touched on benchmarking in our previous discussions, but let's take a deeper look at the process of benchmarking as a way to prepare your training calendar. One of the first reasons you'll want to benchmark is because you need plenty of supporting material in order to obtain buy in from your executives, your training and development team, and the organization as a whole. When you present your plan along with the proof that similar organizations are proceeding in a similar fashion, you'll be able to build your argument. The second reason you'll want to benchmark is simply because you need to know what's going on and what techniques are being used for the coming year. With this knowledge, you can ensure that what you're doing has an impact in today's environment.

First, let's take a more detailed look at benchmarking other organizations. Find organizations that are similar to yours in size, scope, and product offering. But you'll need to go deeper, that is, to the "roots" level. In other words, find organizations that have similar cultures, training programs, and values. There is not much difficulty in finding similar organizations, but you'll probably have to dig deeper to find the cultural and values similarities. One place to start is your local training and development network, such as your local chapter of ASTD or ISPI. Find out who works for which companies and spend a little time finding out what their calendar looks like.

Ask your network what training methods are being employed and how their budgets are shaping up. You can find quite a bit of raw material with which to benchmark your own organization this way. As a reminder, if you've conducted benchmarking before, it's time to do it again. Every organization changes direction during the year and when planning a new year, so information you've gathered in the past is probably pretty stale.

First, let's take a more detailed look at benchmarking other organizations. Find organizations that are similar to yours in size, scope, and product offering. But you'll need to go deeper, that is, to the "roots" level. In other words, find organizations that have similar cultures, training programs, and values. There is not much difficulty in finding similar organizations, but you'll probably have to dig deeper to find the cultural and values similarities.

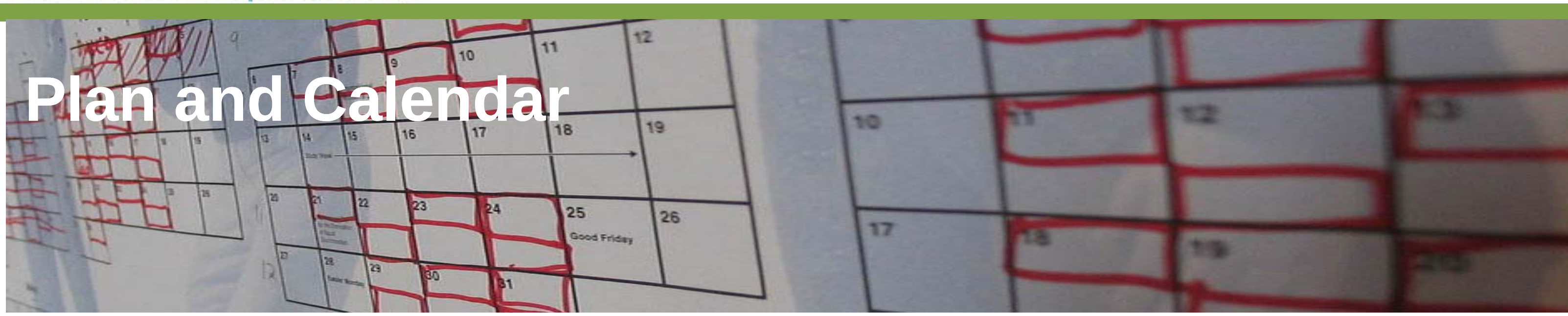
One place to start is your local training and development network, such as your local chapter of ASTD or ISPI. Find out who works for which companies and spend a little time finding out what their calendar looks like. Ask your network what training methods are being employed and how their budgets are shaping up. You can find quite a bit of raw material with which to benchmark your own organization this way. As a reminder, if you've conducted benchmarking before, it's time to do it again. Every organization changes direction during the year and when planning a new year, so information you've gathered in the past is probably pretty stale.

Let’s talk about benchmarking your industry in general. Be sure to keep reading your industry publications. If you don’t receive any, use your intra-organizational network to locate some of these items. Analyze the content to determine where your industry is headed. Another way to gather raw data from the industry is to look at advertising-and deduce what the training department may have to do at those organizations. For example, if an organization is hitting advertising heavily for its front line services, you can bet that it will be hiring and training front line personnel. And, if your organizations are similar, you can probably deduce that the rest of the industry may follow suit. Plus, think about the support staffs that will need to be “beefed up” to meet a new need. Obviously each situation is different, but at least you can gather some information about the state of your industry.

Don’t forget to benchmark within the training and development “industry” as a whole. Again, your industry related publications can give you a good idea of the “hot” items for the coming year. You can also look at advertising within these publications to obtain an idea of the newest training methods: who is advertising their services heavily? Consider the information you’ve obtained about your organization so far. Is your training organization going to need to adopt new training methods in order to keep up with new audiences and new material? Again, your local training and development network can help you with benchmarking the industry. Find out what people are doing to make new design and delivery methods happen. Are they increasing staff or cross-training the staff they have? Are your colleagues getting by with a skeleton crew until the economy begins to improve?

If you at least gather data in these three areas during your planning, you'll get a picture of the industry and similar organizations. You'll also be able to present your case to your executives, stakeholders, and staff with confidence. The next step is to plan your physical calendar.

Plan and Calendar



You've taken the time to assess your organization, your department, and the industry in general. You know what you need for the coming year, so the next step is to lay it all out. Your plan and calendar should have a multi-sided approach, that is, you should create a calendar for your department, your stakeholders, and for your executive team. Think about your plan and your calendar as you would a resume: each one should be ‘tweaked” to match the group you're trying to impress.

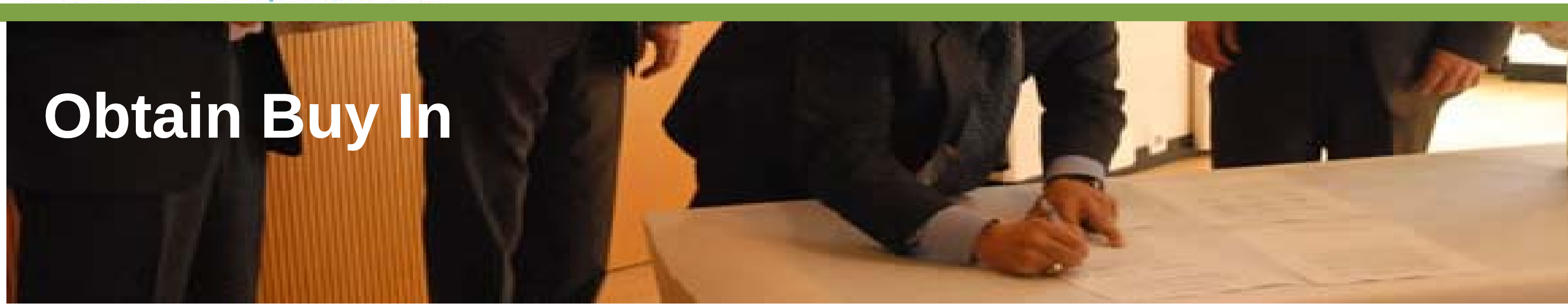
The first step in actually laying out a calendar is to go back to your chief stakeholders to look at their calendars. Does each stakeholder group have ‘blackout’ dates? In other words, some departments have certain time periods where training is difficult due to heavier workloads, major projects, or even staff member travel. In this age of financial uncertainty, are your stakeholders going to reduced hours or staffs that may create an impediment to training? Perhaps some of your audience groups are moving to telecommuting a few days a week and would benefit from online training. Also consider the fact that your stakeholders might be moving functions around to different departments and geographic locations. All of these are factors in your calendar process. Plus, by asking the stakeholders about their own time issues, you’re further solidifying your position as a strategic business partner.

In addition to time issues, it’s a good idea to conduct an overall assessment of your stakeholder groups while you have their attention. What issues are they having in terms of performance? What problems might they be facing in the upcoming year? Are these issues a part of your original assessment or are they additional? When you ask these questions, you can also plan for those items that were not captured in your original assessment.

Another item to consider before actually ‘calendaring’ is to plan your own changes and updates to both online and classroom training. When do your updated courses need to be ready, and who is going to be doing the development? Do you have the availability of staff for these projects at certain times of the upcoming year? Or do you need to change things around in order to dedicate certain personnel to certain projects? Consult with your staff in order to create timelines or project plans for each piece. With this information, you can plan for your own ‘blackout’ dates in tandem with those of your stakeholders.

It’s also a good idea to consult with your site management group to discuss the availability of classroom training venues. If your training department manages these venues, go ahead and place tentative dates in the master calendar to avoid conflicts. If not, you'll want to make sure that multi- or general purpose facilities are available for training use when you need them. If you find that you'll have to rent space for large gatherings, get in touch with your vendors immediately. With all of this behind you, you'll find that creating your calendar is much easier.

Now you can begin to lay out your calendar, and keep in mind that it needs to be multi-dimensional. Create an overall calendar for your training managers and stakeholders. Go to the department level for specific areas within your stakeholder groups, as well as within your training and development organization. You'll also want to create a comprehensive calendar for yourself; this calendar can also serve as the supporting material for your executive sponsor or team. This multi-dimensional calendar process may be time consuming, but think about the time you'll save in the coming year if you have these resources. At this point, consider scheduling 'calendar' meetings with your stakeholders, but be sure that you have time to take care of the next planning step, obtaining buy-in.



Obtain Buy In

As with any individual training program, you must obtain buy-in from various groups in order to make your training plan a reality. You should plan to obtain buy-in from the executive team, your stakeholders, your training team, and, perhaps most importantly, from the person or persons who hands out the budget dollars. But don't worry. You've done your research, you have plenty of supporting material, and you even have a rough calendar that you can use as a visual aid. Let's discuss each group.

First, you should go to your executive team. Again, the makeup of this group depends on your organization. You may simply have one executive sponsor or you may have to present to the entire team. Before you present to a team, think about the executives who really need to be partners with you: the financial person, the head of one of your chief groups of stakeholders, or even the chief executive. Consider tailoring parts of your presentation to those people, emphasizing the final value of what you plan to do in the upcoming year. Along those lines, any presentation to an executive team should focus on ROI or at least on what value everyone will gain from the training plan. Be prepared to explain why you've chosen the plan along with the value you expect to gain. Also, remember to connect your presentation back to the original assessment meeting with the group. And, perhaps most importantly, be sure to explain how each piece of your plan and calendar satisfies the organization's objectives for the upcoming year.

Next, you'll want to go back to your stakeholders to obtain buy-in. We've spent quite a bit of time working on your stakeholders; this is not "overkill" but a way to reiterate the partnership between you. You've asked the stakeholder groups about their plans, their blackout dates, and even their issues that may not have appeared in your original high-level assessment. And now you have a rough calendar to show them. Along with this rough calendar, take some time to create rough outlines of any new programs they are going to need. If you can show them the dates on the physical calendar and then show them what their team is going to learn during training, you've just added tremendous value. Schedule a meeting with your stakeholders to show them all of your supporting material. But above all else, ask your stakeholder groups for input on what you've planned out. One of the biggest mistakes a training organization can make is to show a plan and then walk-without saying, "hey, do you think this will work for you guys?"

Once you have the approval of your executive team and your stakeholders, take the time to go back to your training staff with the calendar and plan you've created. Use your high level presentation to give everyone an overview of upcoming projects and initiatives. You can show each group who they are going to be partnered with-and your groups will be much more knowledgeable about where each stakeholder group fits in the overall plan. In addition, you can show your training group why they are doing what they are doing. Many times, the lower rungs of a training group simply churn out material or courses in a vacuum. With your attention, each person will understand how he or she is helping the organization meet its overall mission and goals.

Use your detailed plans and calendars in order to present to your training managers and administrative staff. Obviously managers need to know what's going on from a detailed level. But your admin staff, the ones who run the LMS, the calendars, manage training facilities, and even answer phones and emails, should have this knowledge as well. However you meet with your staff, be sure to ask them for input. The front line in any organization sometimes sees issues and opportunities that managers miss-and this information can be extremely valuable. If you need to make "tweaks", do it as a group.

With the buy-in of your most important groups, and the approval to move forward from your executive team, you can begin making changes to your own organization to match the need for the upcoming year.

Change Your Organization

Now that you have the approval to move forward, you'll probably have to make some changes within your own department in order to meet the organization's needs for the upcoming year. As you've conducted your assessments and laid out your training calendar, you probably also have an idea of what those changes are going to be. Plus, you may have a change in your budget that precipitates change in staffing. Whatever your changes may be, you can accomplish them well by ensuring that everyone knows why the change is being made and how each change affects the overall vision and mission.

The first area in which to make changes is usually staff. The longer the staff has to get used to new duties, changes in processes, or even to new staff members, the better off you'll all be. Obviously if you have to conduct layoffs you'll need the involvement of your human resources department. And, in today's world, there is simply no easy way to cut staff. On the other hand, if you are hiring, get your job descriptions up and running as soon as possible. The economic environment guarantees that you will have more candidates to choose from than ever before, so you'll need time to make decisions.

But what if you are neither hiring nor firing, and simply need to change up duties? This type of change is sometimes the hardest for staff to handle. The first thing to remember is that for each change, you should be able to show a benefit, either to the organization, the individual, or both. Also, make sure that anyone who has been asked to change directions understands why he or she is being asked to make that change. If changes in duties require cross-training or additional training, the time is now to schedule and get these things moving. The key in making staff changes is simply to do it now. Don’t wait.

You’ve already assessed your infrastructure, so the next step is to make changes in that area. If you don’t have budget money yet, plan your changes down to each minute so that no time is wasted once you do have the money. If you need to make technology changes, start your meetings with your IT group. Be sure you know what you’re going to need before you approach them-they are probably going to be just as busy as you are in the coming year. For your LMS, get in contact with your vendor to start the changes you’ll need to make. Some LMS changes or updates can occur overnight, while some of them take some customization. Also, take the time to meet with your facilities groups or site management. Most of these meetings should take place before the end of the year or within the first couple of weeks of the new year. Again, don’t wait.

If your budget has changed, change the corresponding line items. And don't forget to notify the corresponding personnel. Your managers also need to know what kind of budget they are dealing with, as well as on what items that budget should be spent. When it comes to your budget, be sure to schedule a budget meeting with each of your key staff members. Help them make allocations based on all of the information you've gathered about the coming year. Don't leave them to make decisions alone, especially if the budget has changed.

If you're making changes, you are probably expecting some change in design and delivery methods. Meet with your delivery teams in order to gain insight on how to change methods or "spice them up" to meet the challenges of a new year. If you have staff development money, send the instructors and facilitators to training courses. This kind of development comes in handy at the beginning of a fresh year. The same goes for your design teams. Overall, the idea is to determine how skill levels currently stand and what changes need to occur in order to update those skill levels. And all of this has to happen within the framework of meeting the organization's needs in the coming year.

Once you've begun implementing your changes, show your plans to your executive sponsor or team. This is further supporting evidence of your willingness to change your organization in order to meet the overall needs for the coming year. The final step in planning your training calendar is to consider how you'll keep moving forward.

Moving Forward

Summary: You've done quite a bit of work in planning your training calendar. Let's look at how to move forward while avoiding the proverbial "ivory tower", resistance to change, and negative reactions to deviations from your plan.

We all know the old saying about the "best laid plans", and this holds especially true for training departments. Plus, many of our organizations are moving forward in uncharted territory because of the past two years of economic downturn. We also know that it's easy for training departments to get caught in the "tower" when things change. And we also know that deviations from our plans are almost always going to happen at some point during the year. Let's discuss how you can continue moving your organization forward even when major changes occur.

The first thing to do is remember that everything your training organization does is eventually for the overall good of the organization. And make sure all of your staff members keep this frame of mind over the coming year. Each change or deviation will have a benefit somewhere along the line; your job is to define those benefits to the personnel who are involved. Each time you make a change, be sure to track that change back to the mission and goals of the organization, and explain the change in those terms. If there doesn't seem to be a correlation, do a little more research.

Next, be sure that your training department “exudes flexibility”. In other words, every person who works in the training and development function should be willing to listen to input, absorb changes, and re-focus quickly. You’ve already shown that you can plan, calendar, and partner, so don’t loose that perception by becoming inflexible. When your stakeholders call you up and tell you that things have changed, meet that call with a simple, “how can we help?” That’s not to say that you shouldn’t consider the consequences, but in today’s environment our job as training professionals is to help our stakeholders adjust. Also, take the time to analyze each situation and be sure that each change can be “fixed” with a training intervention. If not, make suggestions as to how the stakeholder group can meet the change without your help.

Be willing to experiment. You may be using new methods of design and delivery, so be willing to backtrack and make changes as they are needed. And be sure that each member of the training staff is able to look at him or herself critically. On those lines, be sure that each audience evaluates each piece of training. Your department’s willingness to submit to critique will help you avoid the “ivory tower”.

Another way to keep moving forward in a positive manner is to revisit your original assessment and any changes you’ve made at regular intervals. Take a good look at how things are going and how new courses and delivery methods are perceived. Also, from your original assessment, determine if those high level changes are coming to fruition. If not, consider revisiting your executive team to see what’s going on with the organization’s overall direction.

There is no harm in asking how things are going in order to be prepared for deviations of the original plan. What about your benchmarks within the industry? Can you look at the data you gathered and determine if the industry has changed as you thought it would? If not, what exactly is going on and how do those changes affect your organization and its training plan?

Obviously the best way to plan for the upcoming year is to go through each of the steps we've discussed in this series. But right now we are discussing how to keep moving forward even when things may change. The best advice here is to be ready for change and to be willing to step outside of your original plan in order to show forward movement.

The whole idea of being flexible is not just a way to meet the organizations needs. It's also a way to maintain the partnerships that you've worked so hard to build. Remember that each change has a benefit and you should be the one to find it, publicize it, and use it to move the entire organization forward.


What are you waiting for?
Get started now!

About the Author:

Bryant Nielson is a Director of FinancialTraining Solutions, Inc. Bryant has a long developed reputation for Corporate University (CU) development and training within the financial space. He is the author of dozens of e-books on Corporate Training and over 300 articles on training, leadership, elearning and corporate training.

Bryant brings to FTS a clear understanding of the strategic development of program curriculum and a client approach that integrates training programs into the client's business objectives flawlessly. He can be reached via email at: bnielson@financialtrainingsolutions.com

About the Company:

FinancialTrainingSolutions is a training company that specializes in providing solutions to firms within the financial space. The firm is comprised of 15 individuals who collectively offer over 100 years of training experience and 100 years of Wall Street expertise.

The people of FinancialTrainingSolutions have experience delivering training programs and products to companies on a global basis. To learn more about the company, please feel free to visit our website at: www.FinancialTrainingSolutions.com

FinancialTrainingSolutions

US +(917) 447-3221 | UK +44(20) 3356 9935

You can download a copy of this White Paper at:
http://www.financialtrainingsolutions.com/whitepapers.php