Project Proposal

Corporate Training Model

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Context Description

Environment Introduction

Guarantee, aiming at helping small and medium-sized enterprises (SME) achieve their financing objectives, is becoming a new commercial service industry in China and has great market potential. This is a professional guarantee institute, which was established in 2003. The institute serves both individual and institutional customers. It has ten departments and around one hundred employees. The institute recruits around ten new employees annually and most of them are new graduates.

I am the instructional designer of the corporate training department team. The services our department provides include: conducting needs analysis to determine learning needs, analyzing performance problems and identifying appropriate solutions, selecting delivery methods and instructional strategies, implementing training, and conducting evaluation to test closure of the performance gaps.

According to our observation, investigation, and communication with HR and other departments, there exist many performance problems within the institute. Our department manager is concerned about the current training system, thus is considering designing a practical training model to support the department operation. As the instructional designer, I am assigned to design a model that aligns with the corporate strategies and the individual goals. The model will serve as the guidance for the corporate training team on establishing a systemic and systematic training system.

Intended Audiences

Primary Audiences

- Training manager, who leads the training and integrates it with the corporate strategies
- Instructional designer, who designs training materials and aggregates useful information
- Trainer, who delivers, presents and facilitates learning
- Administrator, who is in charge of external training program selection, data collection and recording, internal and external training program evaluation, and logistics

The audiences also include the general manager and all the employees who will benefit from the training model.

Purposes of the Model

The purpose of the model is to provide a step-by-step guidance to the corporate training team on building a systemic and systematic training system. The following outputs are intended to be achieved:

- Employees engage in work
- Employees constantly develop work related competencies
- Employees perform in appropriate business manner
- Employees increase work efficiency

Model Description

Model Analysis (Edmonds et al. Components)

Orientation: Descriptive

This training model is considered to be descriptive in terms of its orientation. It demonstrates a learning environment, and indicates how the variables of interest will be affected in the environment based on the practical experiences of instruction and learning (Edmonds et al, 1994). For example, there are two approaches to close the employees' performance gap, one is internal training and the other is external training. The training team will analyze the employees' learning needs and then select the optimal solutions to help them close the performance gaps.

Knowledge structure: Procedural

This is a procedural model in terms of knowledge structure. It intends to support how to reach the goals rather than why we reach the goals.

Expertise Level: Novice

This model is appropriate for novice instructional designers. The model consists of three major phases: 1) Analysis, 2) External Training, and 3) Internal Training. Each part provides a step-by-step guide, which adds to its simplicity.

Structure: System-Based

The model has clear sequence, and the components within the model are interrelated and interactive. The model provides a detailed guidance on how to establish a systemic and systematic training system.
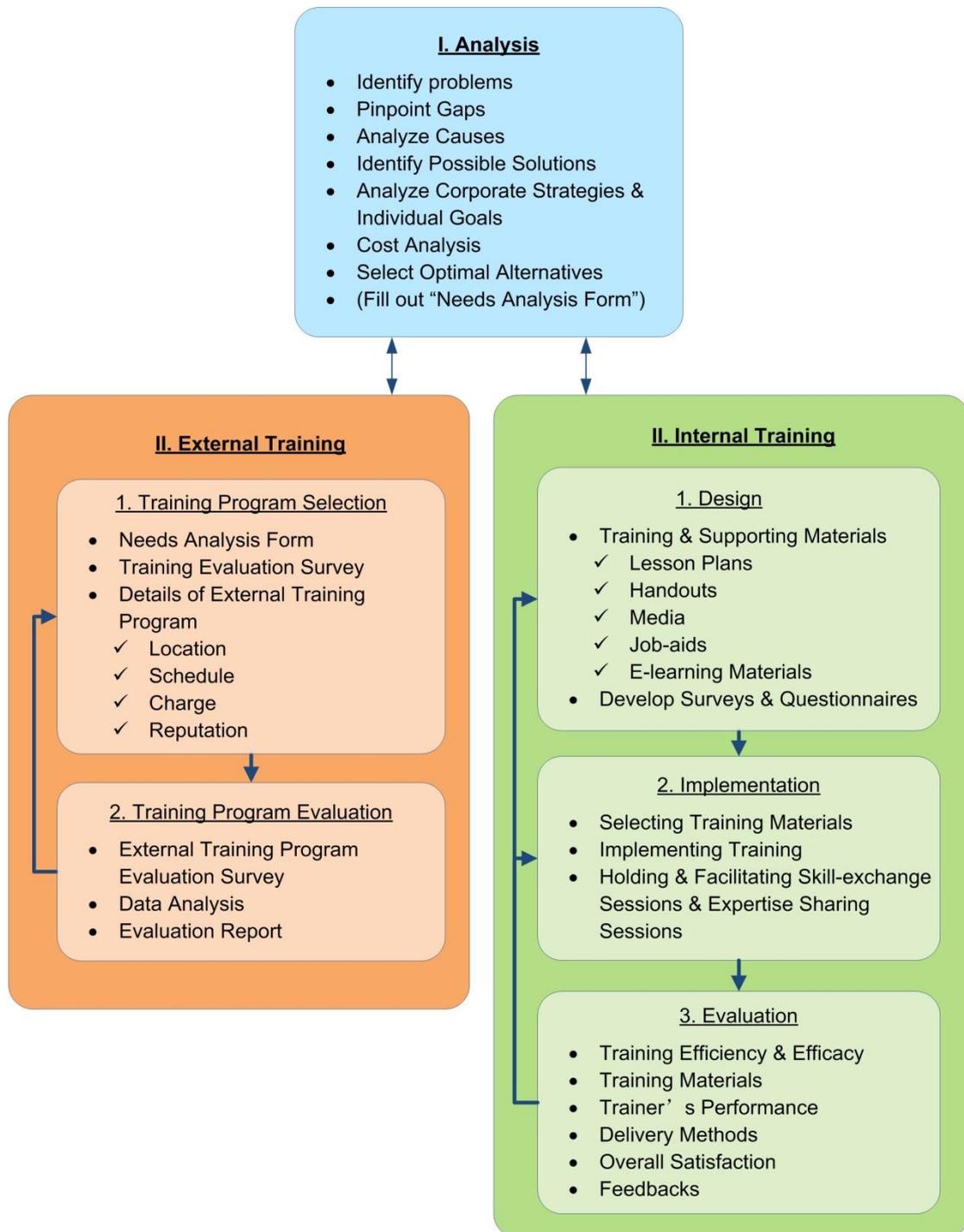
Context: Industrial Context

This training model is designed for a small-sized credit guarantee company, so it is best used in the industrial context.

Level: Unit-Level

Considering the small number of the participants, and the specified training topics and tasks, the training will be applied upon the unit-level.

Model Components

I. Analysis

- Identify problems
- Pinpoint Gaps
- Analyze Causes
- Identify Possible Solutions
- Analyze Corporate Strategies & Individual Goals
- Cost Analysis
- Select Optimal Alternatives
- (Fill out "Needs Analysis Form")

II. External Training

1. Training Program Selection

- Needs Analysis Form
- Training Evaluation Survey
- Details of External Training Program
  - ✓ Location
  - ✓ Schedule
  - ✓ Charge
  - ✓ Reputation

2. Training Program Evaluation

- External Training Program Evaluation Survey
- Data Analysis
- Evaluation Report

II. Internal Training

1. Design

- Training & Supporting Materials
  - ✓ Lesson Plans
  - ✓ Handouts
  - ✓ Media
  - ✓ Job-aids
  - ✓ E-learning Materials
- Develop Surveys & Questionnaires

2. Implementation

- Selecting Training Materials
- Implementing Training
- Holding & Facilitating Skill-exchange Sessions & Expertise Sharing Sessions

3. Evaluation

- Training Efficiency & Efficacy
- Training Materials
- Trainer's Performance
- Delivery Methods
- Overall Satisfaction
- Feedbacks

Roles and Responsibilities

The model is designed for the training team on helping them establish an efficient training system. Here are the roles and responsibilities:

- Training manager
  - ✓ Analyze needs
  - ✓ Identify problems
  - ✓ Analyze cost
  - ✓ Identify and select optimal alternatives
  - ✓ Lead and integrate the training with the corporate strategies
- Instructional designer
  - ✓ Design training materials
    - ◦ Lesson plans
    - ◦ Handouts
    - ◦ Media
    - ◦ Manuals, job-aids, guidelines
    - ◦ E-learning materials
  - ✓ Develop surveys and questionnaires for assessment and evaluation
  - ✓ Collect useful information
- Trainer/facilitator:
  - ✓ Identify training goals and learning objectives
  - ✓ Determine training strategies
  - ✓ Deliver training
  - ✓ Hold/facilitate knowledge exchange sessions
  - ✓ Assess training outcomes
  - ✓ Explore new training and learning methods
- Administrator
  - ✓ Select external training program
  - ✓ Assess the learning outcomes of internal and external training
  - ✓ Evaluate the success of internal and external training programs
  - ✓ Collect and record data
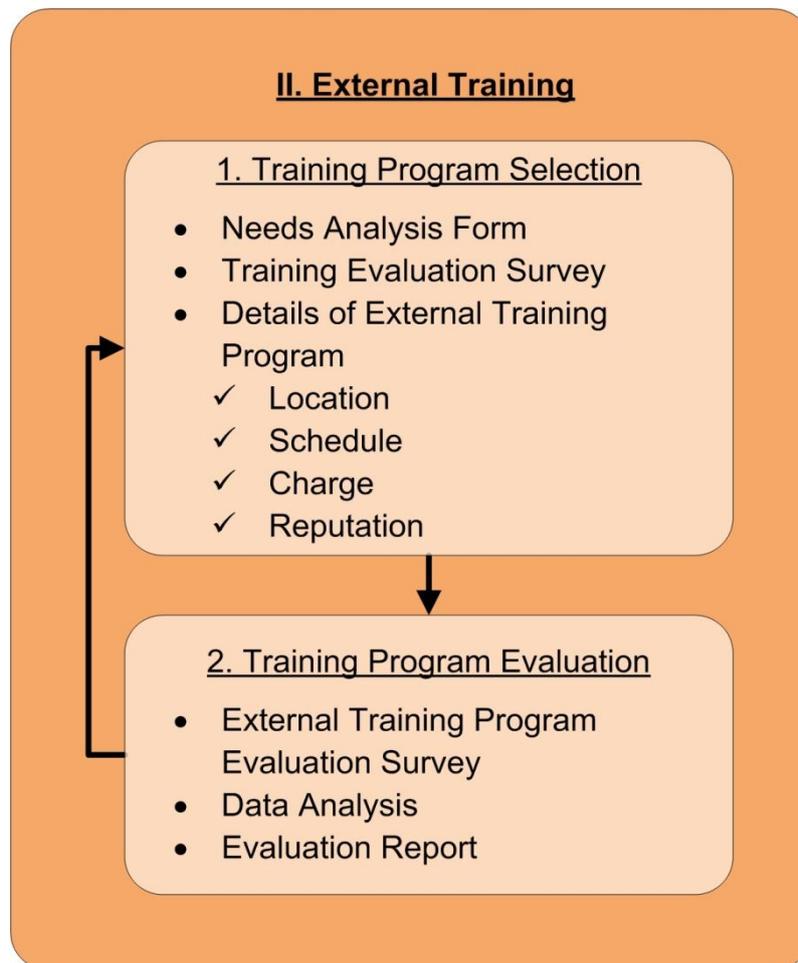
Phase1. Analysis

I. Analysis
- Identify problems
- Pinpoint Gaps
- Analyze Causes
- Identify Possible Solutions
- Analyze Corporate Strategies & Individual Goals
- Cost Analysis
- Select Optimal Alternatives
- (Fill out "Needs Analysis Form")

There are three major phases within this model. The entry point of the model is analysis. It involves seven procedures: 1) Identify Problem, 2) Pinpoint gaps, 3) Analyze causes, 4) Identify Possible Solutions, 5) Analyze Corporate Strategies and Individual Goals, 6) Cost Analysis, and 7) Select Optimal Alternatives.

The training manager is charge of this phase. In order to identify the problems and select the best solutions, several needs analysis tools and techniques can be used, such as observation, interview, survey, questionnaire, and group discussion. The corporate strategies, the individual goals, and the cost related issues should be considered as well. The training manager determines whether the problem should be solved by internal or external training, fills in the "Needs Analysis Form", and provides the form to the instructional designer (internal training), or the administrator (external training). The major information included in the "Needs Analysis Form" includes:

- Needs description
- Budget
- Schedule
- Recommendation

Phase2. External Training

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┌─────────────────────────────────────────────┐
│            II. External Training              │
│                                               │
│   ┌───────────────────────────────────────┐  │
│   │    1. Training Program Selection       │  │
│   │                                        │  │
│   │   • Needs Analysis Form                │  │
│   │   • Training Evaluation Survey         │  │
│   │   • Details of External Training       │  │
│   │     Program                            │  │
│   │       ✓  Location                      │  │
│   │       ✓  Schedule                      │  │
│   │       ✓  Charge                        │  │
│   │       ✓  Reputation                    │  │
│   └───────────────────────────────────────┘  │
│                       │                       │
│   ┌───────────────────────────────────────┐  │
│   │    2. Training Program Evaluation      │  │
│   │                                        │  │
│   │   • External Training Program          │  │
│   │     Evaluation Survey                  │  │
│   │   • Data Analysis                      │  │
│   │   • Evaluation Report                  │  │
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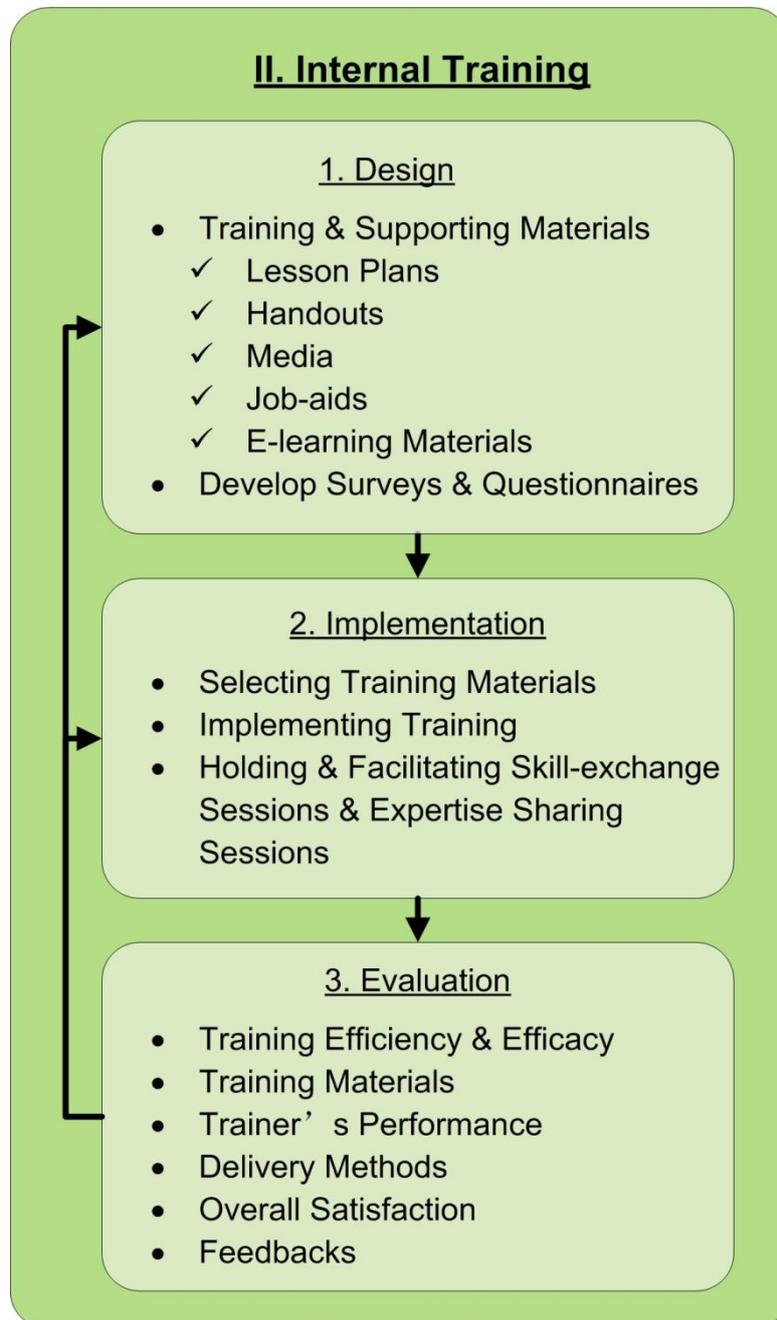
The administrator is in charge of this phase. One of his or her major responsibilities is to help employees select appropriate external training programs. Beside the "Needs Analysis Form" provided by the training manager, two additional factors should be considered as well: 1) the details of external training programs, such as the location, the schedule, the charge, employee feedback, and the program reputation; 2) the "Training Evaluation Survey" from employees who have participated in the program. Moreover, the administrator communicates with the employees to confirm.

When the employees finish the program, they are required to evaluate the program by filling the "External Training Program Evaluation Survey". The administrator analyzes and maintains the results, and writes the evaluation report. The report will be used to make future decision on program selection. If required, employees will share the skills and the knowledge they have learned with their peers.

Phase3. Internal Training

There are three roles in this phase: 1) the instructional designer, 2) the trainer and 3) the evaluator.

II. Internal Training

1. Design

- Training & Supporting Materials
  - ✓ Lesson Plans
  - ✓ Handouts
  - ✓ Media
  - ✓ Job-aids
  - ✓ E-learning Materials
- Develop Surveys & Questionnaires

2. Implementation

- Selecting Training Materials
- Implementing Training
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3. Evaluation

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Instructional Designer

The instructional designer collaborates with subject matter experts to design instructional and supporting materials, such as lesson plans, handouts, and job-aids. Considering the learning time can be extended beyond the classroom and the employees can access the internet, the instructional designer's responsibilities also

include designing E-learning materials, for example, 10 minutes/day learning on effective email writing, and how to dress professionally. Collecting and maintaining useful information and designing the surveys and the questionnaires are also the instructional designer's responsibilities.

Trainer

The focus of the trainer is placed on selecting instructional materials and implementing training. Besides, the trainer's responsibilities also include holding and facilitating skill-exchange sessions and expertise sharing sessions.

Evaluator

The administrator is in charge of the internal training program evaluation. Different data collection instruments can be used, such as surveys, questionnaires, and interviews. The evaluation concentrates on the efficiency and efficacy of the training program, the design of the training materials, the delivery methods, the instructional strategies, and the performance of the trainer. The administrator writes the evaluation report and shares the report to all team members, so as to help them make adjustments.

Reference

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Harless, T. (1975). An Ounce of Analysis is Worth a Pound of Cure. Newman, GA: Harless Performance Guild.