

## INDEX

---

### A

- Accelerating Learning Paths: by applying learning principles, 90–104; case study on, 106–109*e*; described, 4, 19; illustrated figure on, 90*fig*; Learning Path Evaluation Checklist for, 105*e*
- Accepting only perfection, 124
- Affinity Diagramming brain storming, 192, 193*fig*
- Application activity, 228
- Attitudes (affective or emotional domain), 149

### B

- Below average performers, 160
- Brainstorming: Affinity Diagramming, 192, 193*fig*; setting meetings for, 138
- Building support, 125–127
- Business needs. *See* Connecting to business needs
- Business planning, 169–171
- Business process outsourcing, 183

### C

- Capturing content: electronic capture for, 189–190; presentations for, 188–189; process mapping for, 192–195; video for, 191–192
- Case studies: to create new classroom experience, 236; GII and Accelerating Learning Paths, 106–109*e*; GII and CSR performance measures, 52*e*; GII and Quick Hits process, 79–84*e*; GII and Readiness Assessment, 33*e*–34*e*; GII and Selecting a Function, 35*e*; GII and Selecting Learning Path Teams, 36*e*; mapping learning paths, 69*e*–71*e*
- CBT (computer-based training), 201
- Centralization, 182
- Classroom training: compliance in, 237–238; creating a new experience in, 231–243; follow-up in, 239; games in, 237; introductions, 233–234; using on-the-job practice instead of, 103; practice activities in, 235–236; real situations in, 237; reducing time spent in, 103; reserved for practice and discussion, 92–93; team building in, 234

- Coach-the-coach sessions, 217
- Coaches: coaching the, 217–218; debriefing by, 213; as motivator, 209–211; as teachers, 211–212
- Coaching: for the coaches, 217–218; evaluation and feedback used in, 215–217*e*; job aides used in, 212; motivation through, 209–211; as Quick Hit, 77; training meetings used in, 213–214*e*
- Coaching Guide, 219*e*–220
- Coach's coach, 218
- Communication for transition, 115–116
- Competency models: overview of, 149–150; proficiencies vs. competencies of, 101–102; turned into proficiency models, 150–153. *See also* Proficiency models
- Compliance: in classrooms/workshops, 237–238; as directed self-study issue, 228–229
- Connecting to business needs: business planning for, 169–171; Learning Path planning process for, 176–179*e*; Learning Paths and ROI for, 180–181; organizational initiatives for, 181–184; planning process of training and, 172; proficiency planning process for, 172–176; role of learning function leader in, 171
- Customer Satisfaction report, 122*fig*
- Customer Service Learning Path, 118*fig*
- D**
- Debriefing employees, 213
- Definition of Proficiency, 119*fig*
- Demonstration, 211
- Design phase, 128
- Design templates, 99–100
- Directed self-study: compliance and motivation for, 228–229; defining, 4, 221, 222; development process of, 222–225; instructional design template for, 225–228; self-study needs and, 93–94; Self-Study Project Plan template, 136*e*; Self-Study Tracking Sheet template, 137*e*
- Directed self-study development: step 1: identify topics, 222; step 2: outline, 223*e*–225
- Documentation: editing and proofing Learning Path, 139–140; as learning principle, 100–101; of reviews, 138
- Drills, 212
- E**
- Electronic capture, 189–190
- Employees: below average performers, 160; coaching and mentoring, 77; debriefing, 213; establishing Time to Proficiency measures for, 20, 39–54*e*; experienced new hires, 161; job aides to facilitate, 78; manager/leadership paths for, 162–165; monitoring progress of new, 75–76; organization functions with few, 161–162; pre-hiring process and, 76–77; ready for the next level, 161; top performers, 158–160; turnover of, 165–166. *See also* Stakeholders
- Evaluation: Learning Path Evaluation Checklist, 105*e*; monitoring employee progress using, 75–76; as part of coaching, 215–217*e*; as part of mapping, 69; Self-Evaluation Sample 1, 216*e*; Self-Evaluation Sample 2, 217*e*. *See also* Testing
- Experienced new hires, 161
- F**
- Feedback, 215–217*e*
- Field sales baseline measure: establishing, 42*e*; of new employees, 43*e*; sales learning path and, 44*e*; summary of, 43*e*; Time to Proficiency Survey on, 44*e*
- Field sales business results measurement: described, 49*e*; establishing, 49–52; finding break-even, 50*fig*; by new employee, 53*e*; summary of, 54*e*
- Field sales ongoing measurement: calls per day, 45*fig*; comparing call types, 47*fig*, 48*fig*; comparing proficiency measures, 46*fig*; establishing, 45–48
- Findings Report, 60
- Follow-up (classroom training), 239
- Formal training Learning Path examples, 65–66*e*
- Format template, 139–140
- G**
- Games, 237
- GII (Generic International, Inc.): Accelerating Learning Paths for, 106–109*e*; CSR performance measures for, 52*e*; Quick Hits process used by, 79–84*e*; Readiness Assessment for, 33*e*–34*e*; Selecting a Function for, 35*e*; Selecting Learning Path Teams for, 36*e*
- Graduation Day: described, 5; searching for Quick Hits and, 73, 74*fig*
- H**
- High-level timeline, 64*e*
- I**
- Implementation: as Learning Path Project development phase, 129; as part of 30/30 Plan Quick Hit, 78, 79*fig*
- Inadequate resources, 125
- Incumbent interview questionnaire, 60, 61*e*
- Independence Day: to create Time to Proficiency Measures baseline, 40–44; defining, 5; searching for Quick Hits and, 73, 74*fig*
- Independently Productive: defining, 5; importance of understanding, 13–14

- Instructional design template: application activity, 228; four key elements of, 225; set-up activity, 225–226; tests, 228; text, 227
- IT enterprise-wide solutions, 184
- J**
- Job aides: facilitating learning using, 78; “reminder cards” used as, 212; replacing training with, 103
- Job experience mapping, 68
- K**
- Keepers of the process, 218
- Kickoff Meeting Agenda, template for, 32*e*
- Knowledge (cognitive domain), 148
- L**
- Lack of adequate reviews, 124
- Lack of participation, 124
- Lack of support, 124
- Lack of testing, 125
- Leadership Learning Path 1 template, 163*e*
- Leadership Learning Path 2 template, 164*e*
- Lean manufacturing, 184
- Learning: putting learning path, 17*e*; three-week golf training program, 15*e*; understanding process of, 14–18
- Learning activities, 153–154
- Learning experiences, 212
- Learning function leader, 171
- Learning objectives, 153–154
- Learning Path Evaluation Checklist, 105*e*
- Learning Path examples: formal training, 65–66*e*; on-the-job activities, 67*e*–68*e*
- Learning Path planning process: step 1: define changes to Learning Path, 176; step 2: estimate timeline, 177; step 3: estimate costs, 177–179; illustration of, 176*fig*; template for, 179*e*
- Learning Path Project development: design phase of, 128; development phase of, 129; implementation phase of, 129; three-phase, 127–128*fig*
- Learning Path Project Plan template, 133*e*
- Learning Path Projects: building support for, 125–127; common pitfalls in, 123–125; development process of, 127–129; editing and proofing, 139–140; organization of, 129–131; pilot tests of, 139; planning and tracking, 131–135; reviews of, 135–138; training teams for, 140–141
- Learning Path Teams: defining, 5; learning path for, 142*e*; selecting, 31*e*; selecting for GII (Generic International, Inc.), 36*e*; training, 140–141; virtual, 141. *See also* Teams
- Learning Path for Teams template, 142*e*
- Learning Path template, 64, 65*e*
- Learning Path Tracking Sheet template, 134*e*
- Learning Paths: accelerating the, 4, 19, 89–110; defining, 5; implementing the, 20; to leadership and manager positions, 162–165; mapping out current, 19, 57–72; our vision of training using, 241–243; ROI (return on investment) and, 180–181; sales, 44*fig*; for teams, 142*e*; templates for, 30*e*, 64, 65*e*. *See also* Training
- Learning Paths changes: defining, 176; estimate timeline for, 177; estimating costs of, 177–179
- Learning Paths Methodology: defining, 5; illustration showing steps in, 19*fig*; our vision for training using, 241–243; step 1: select a function, 18; step 2: determine time to proficiency, 18; step 3: map out current path, 19; step 4: accelerate the learning path, 19; step 5: implement the path, 20; step 6: measure and report, 20
- Learning principles: applying, 90–91, 103–104; #1: manager need to be trainers, 91–92; #2: reserve classroom time for practice and discussion, 92–93; #3: all self-study needs to be directed self-study, 93–94; #4: teach the whole job, not parts, 94–95; #5: require mastery, not participation, 96; #6: connect to business needs, 96–97; #7: embrace technology, 98; #8: quantity vs. quality, 98–99; #9: use design templates, 99–100; #10: make content king—write it down, 100–101; #11: use proficiencies vs. competencies, 101–102; #12: motivation, 102–103
- LMS (Learning Management System), 64, 117–118
- M**
- Maintenance: LMS (Learning Management System) to facilitate, 64, 117–118; planning, 116–117. *See also* Transition
- Managers: as both trainers and, 91–92; establishing as coach, 209–220; interview questionnaire for, 60, 61*e*; Learning Path to leadership and, 162–165
- Mapping learning paths: case study on, 69*e*–71*e*; described, 19; incumbent interview questionnaire for, 60, 61*e*; manager interview questionnaire for, 60, 61*e*; mapping session, 62–71*e*; preparation for, 60–62; research checklist for, 59*e*–60; three key questions when, 58; uncovering the mystery, 58*fig*
- Mapping sessions: agenda for, 62–64, 63*e*; high-level timeline for, 64*e*; Learning Path template used for, 64, 65*e*; step 1: enter formal training, 65–66; step 2: on-the-job activities, 67–68; step 3: enter testing and evaluation, 68; step 4: enter job experience, 68; step 5: reconcile differences, 68–69; step 6: evaluate, 69
- Mentoring, 77
- Mergers and acquisitions, 182–183

Milestones: Quick Hits, 75–76; reporting results at major, 118–122*fig*

Missing stakeholders, 125

Money Saved report, 121*fig*

Motivation: coaching for, 209–211; directed self-study and, 228–229; to facilitate learning, 102–103; transition and issues of, 115–116

## O

On-the-job activities Learning Path examples, 67*e*–68*e*

On-the-job practice, 103

Organizational initiatives: business process outsourcing, 183; centralization, 182; IT enterprise-wide solutions, 184; lean manufacturing, 184; mergers and acquisitions, 182–183

Outline for directed self-study, 223*e*–225

Outsourcing (business process), 183

## P

Perfection expectations, 124

Pilot tests, 139

Planning: business, 169–171; to connect business needs, 172; Learning Path Projects tracking and, 131–135; maintenance, 116–117; process of Learning Path, 176–179; process of proficiency, 172–176; transition, 112–114*e*

Practice activities: case studies, 236; role plays, 235–236

Pre-hiring process, 76–77

Presentations, 188–189, 236

Process mapping: described, 192; step 1: assemble a process mapping team, 192; step 2: brainstorm common calls, 192; step 3: map out processes by call type, 193–194*fig*; step 4: rank call types and processes, 194; step 5: establish an instructional strategy, 195; step 6: capture process information, 195

Proficiency: costly delays from Day One until, 12–13; defining, 5, 24*fig*; estimate changes to, 174–176; Quick Hits, 119*fig*; reporting results using definition of, 119*fig*. *See also* Time to Proficiency

Proficiency models: attitudes/affective domain of, 149; attributes of, 148–149; defining, 5; following 30/30 Plan implementation, 155; importance to training, 147; learning objectives and activities, 153–154; research resources to use with, 154, 155*e*; turning competency model into, 150–153. *See also* Competency models

Proficiency planning process: step 1: analyze business plans and objectives, 172–174; step 2: determine changes to jobs or functions, 174; step 3: estimate changes to proficiencies, 174–176; illustrated, 172*fig*; template for, 178*e*

Putting learning path, 17*e*

## Q

Quick Hits: case study on using, 79–84*e*; coaching and mentoring, 77; defining, 5, 73; implementation step, 78; job aides, 78; out with the old stuff first, 74–75; as part of 30/30 Plan, 79*fig*; pre-hire process and, 76–77; Proficiency, 119*fig*; using tests and milestones, 75–76; Thirty-Day Sales Report, 85*fig*–88*fig*; two different place to search for, 73–74*fig*

## R

Re-sequencing training, 104

Readiness Assessment: described, 28; for GII (Generic International, Inc.), 33*e*–34*e*; template for, 29*e*

Real situations, 237

Reconcile differences mapping, 68–69

“Reminder cards,” 212

Reporting Results: Customer Satisfaction, 122*fig*; Customer Service Learning Path, 118*fig*; Definition of Proficiency, 119*fig*; Money Saved, 121*fig*; Quick Hits, 119*fig*; Reduction in Time to Proficiency, 120*fig*; Sales Increase, 120*fig*

Research resources, 154, 155*e*

Reservation baseline, 41*e*

Reusing learning techniques, 104

Review committee, 135

Reviews: lack of adequate, 124; of learning path projects, 135, 138

ROI (return on investment), 180–181

Role plays, 235–236

Round robin, 235

## S

Sales Increase report, 121*fig*

Selecting a function: described, 28; examples of possible, 28, 30; for GII (Generic International, Inc.), 35*e*; Learning Path template, 30*e*

Selecting Learning Path Teams: described, 31*e*; for GII (Generic International, Inc.), 36*e*

Selecting training methods: comparison of training methods, 208*e*; factor 1: effectiveness, 201–203; factor 2: cost, 204–205, 206*e*; factor 3: speed and flexibility, 205, 207; template for, 200*e*

Self-Evaluation Sample 1, 216*e*

Self-Evaluation Sample 2, 217*e*

Self-study needs, 93–94

Self-Study Project Plan template, 136*e*

Self-Study Tracking Sheet template, 137*e*

Seminar, 232

Set-up activity, 225–226

- Skills: as part of behavioral or psychomotor domain, 148–149; technical vs. soft, 95
- SMEs (subject-matter experts), 130, 222
- Soft skills, 95
- Spell checking documents, 140
- Stakeholders: lack of participation by, 124; missing, 125. *See also* Employees
- Stick Factor, 90
- Style template, 139–140
- Super coach, 218
- Support: building project, 125–127; consequences of lack of, 124
- T**
- Tag team, 235
- Teach-backs, 232–233
- Teaching: using demonstration in, 211; learning experiences and drills used in, 212
- Team building, 234
- Teams: Learning Paths for, 142*e*; process mapping, 192; tag, 235; training for Learning Path Projects, 140–141. *See also* Learning Path Teams
- Technology: embraced for learning, 98; value of learning technical skills and, 95
- Templates: used for coaching the coach, 218; directed self-study instructional design, 225–228; used to facilitate learning, 99–100; using format and style, 139–140; Kickoff Meeting Agenda, 32*e*; Leadership Learning Path 1, 163*e*; Leadership Learning Path 2, 164*e*; Learning Path, 30*e*, 64, 65*e*; Learning Path planning process, 179*e*; Learning Path Project Plan, 133*e*; Learning Path for Teams, 142*e*; Learning Path Tracking Sheet, 134*e*; Proficiency planning process, 178*e*; Readiness Assessment, 29*e*; Selecting a Function, 30*e*; Self-Study Project Plan, 136; Self-Study Tracking Sheet, 137*e*
- Testing: lack of, 125; as part of mapping, 68; pilot, 139; Quick Hits on, 75–76; self-study reading assignments, 228. *See also* Evaluation
- Text (instructional design), 228
- Thirty-Day Sales Report: Cover Sheet, 85*fig*; Next Steps, 88*fig*; overview of, 85–86; Proficiency Measures, 86*fig*; Quick Hits Summary, 87*fig*; Thirty-Day Summary, 86*fig*; Time to Proficiency, 87*fig*
- 30/30 Plan: building proficiency model following, 155; defining, 4; illustrated diagram of, 21*fig*, 79*fig*; overview of, 20–23; as part of Quick Hits process, 79*fig*; results of, 24*fig*; sample, 23*e*; Time to Proficiency using, 25*fig*
- Three-week golf training program, 15*e*
- Time to Proficiency: defining, 5; determining, 18; measuring and reporting steps on, 20, 39–55; reporting reduction in, 120*fig*; Thirty-Day Sales Report on, 87*fig*; using 30/30 Plan, 25*fig*. *See also* Proficiency
- Time to Proficiency Measures: described, 20, 39–40; establishing baseline, 40–44*fig*; establishing business results, 49–54*e*; establishing ongoing, 45–48*fig*; Thirty-Day Sales Report on, 86*fig*
- Time to Proficiency Measures (baseline): of field sales, 42*e*; of field sales by new employees, 43*e*; finding Independent Day for, 40–44; reservation, 41*e*; sales learning path, 44*fig*; summary of field sales, 43*e*; survey on, 44*e*
- Time to Proficiency Measures (business results): establishing, 49–52; finding break-even, 50*fig*; for GII (Generic International, Inc.), 52*e*; by new employee, 53*e*; sales results, 49*e*; summary of, 54*e*
- Time to Proficiency Measures (ongoing): calls per day, 45*fig*; comparing call types, 47*fig*, 48*fig*; comparing proficiency measures, 46*fig*; establishing, 45–48
- Toll Gates, 76
- Top performers, 158–160
- Training: CBT (computer-based training), 201; costly delays in, 11–13; importance of Proficiency Model for, 147; for learning path teams, 140–141; our vision of using Learning Paths for organization, 241–243; planning process to connect business needs to, 172; selecting methods of, 199–208. *See also* Learning Paths
- Training meetings, 213–214*e*
- Transition: described, 111–112; motivation and communication issues of, 115–116; phased-in approach to, 114–115; planning, 112–114*e*; reporting results of, 118–122*fig*. *See also* Maintenance
- Transition planning: issues involved in, 112; sample, 113*e*; sample transition issues action plan, 114*e*
- Triads (classroom), 235
- Turnover of employees, 165–166
- U**
- Unclear role definitions, 124
- V**
- Video, 191–192
- Virtual teams, 141
- W**
- Workshops: compliance in, 237–238; defining, 232; follow-up in, 239; games, 237; introductions in, 233–234; practice activities in, 235–236; real situations, 237; team building in, 234
- Written documentation. *See* Documentation

<http://www.pbookshop.com>