



## CHAPTER TWO

---

# BUILDING THE RIGHT FOUNDATION

---

## From Identifying Goals to Establishing an Action Plan

To function across job categories, locations, and work groups, an OJT program must be *organized*—that is, it must be thoughtfully established to achieve its intended purposes. (From this point on, “OJT program” will always refer to a *planned* OJT program.) These purposes, in turn, should be driven by issues important to the organization. In this chapter, you will learn how to establish an OJT program according to the following model:

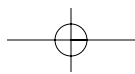
1. Determine the OJT program’s purpose(s).
2. Clarify program goals and objectives.
3. Identify program customers.
4. Formulate program policy and philosophy.
5. Develop a program action plan and schedule.

By addressing the issues in the model, you will take the first important steps in OJT program development.

---

### Determine the OJT Program’s Purpose

Different organizational decision makers will have differing expectations of an OJT program. It is thus unlikely that the program will serve only one purpose. Nevertheless, establishing common program expectations and priorities is



important, and that is the point of determining *program purpose*. An OJT program should have an explicit statement of purpose. The more clearly that purpose is communicated to all stakeholders, the easier it will be to chart program direction across the organization and hold leaders and participants accountable for results.

### Questions to Ask

To clarify program purpose, decision makers should initially focus on one major question: *What is the chief result intended from the program?* Armed with the answer(s) to that question, program leaders and participants should be better equipped to realize that purpose. The purpose statement of an OJT program should also answer these more detailed questions:

- What learning needs should the program meet?
- Who are the targeted participants?
- When should targeted participants be served?
- Where should targeted participants be served?
- Why should targeted participants be served in this way?
- How should the OJT program be integrated with employee orientation, off-the-job training, near-the-job training, off-site education, cross-training, or other organizationally sponsored learning activities?
- How should the OJT program be integrated with workforce planning, recruitment, selection, compensation, employee benefits, work design, organizational design, and labor relations?
- How should the OJT program be integrated with the organization's strategic plan?
- How should newcomers be introduced to the organization, an organizational unit, a job, or a work function?
- How should the organization make newcomers feel welcome?
- How should the organization expose newcomers to effective, positive role models?

### Information to Gather

Information about program purpose can be gathered from four main sources.

**Experienced Program Participants.** Past program participants or experienced job incumbents should have benefitted from OJT and thus be able to answer such questions as these:

- How were you oriented and trained on the work you do?
- What OJT methods do you feel are especially effective or ineffective based on your own orientation or OJT experiences?

- What have you learned about your work through experience that you wish you had been trained in earlier?
- How were you introduced to the organization, organizational unit, work, or work task?
- How do you feel newcomers should be welcomed to a new work setting and helped to fit in?
- How can employees' self-esteem be reinforced during OJT?
- Who are the positive, effective role models to whom newcomers should be exposed?
- How should newcomers be advised to manage any negative role models whom they may encounter?
- How much responsibility for OJT do you believe should be shouldered by each of these groups: learners, trainers, supervisors, and the organization?

Past participants in OJT may also be asked for information about critical incidents in their OJT experiences that shaped their opinions. What specific incidents during their employment with the organization can they describe as especially illustrative of what to do in OJT? Answers to that question can both define the parameters and clarify the desirable purpose(s) of an OJT program.

**Present Program Participants.** Present participants in OJT and inexperienced job incumbents also have opinions about OJT and a personal stake in it. Their opinions are worth knowing if training is to be effective. While they may not be knowledgeable about what they should learn, they may be quite knowledgeable about how they can most effectively learn. They should thus be consulted for answers to such questions as the following:

- How do you learn best? Reflect on past situations in which you were asked to learn, and determine what methods worked best for you.
- What do you feel are especially effective and ineffective OJT methods? How do you account for your opinions?
- What problems, if any, are you already encountering that are intensified because you did not receive adequate OJT?
- How do you feel about your on-the-job trainers? Why do you feel as you do?
- How do you feel about the match between what you are learning in OJT and what you are seeing others do?
- How convinced are you that a systematic plan and schedule guides your training? Or do you feel that OJT is just fitted in haphazardly somehow during your daily work?
- How are you being made to feel welcome, and how are the trainers reinforcing your self-esteem?

- Do you feel you are seeing positive, effective role models?
- In your opinion, what are your responsibilities in OJT? What are the responsibilities of your trainer, your supervisor, and the organization?

**Supervisors.** Supervisors of past and present OJT participants are potential sources of information about program purpose. They can be asked these questions:

- How would you define the desirable purpose(s) of an OJT program?
- How well do you feel OJT has been planned and carried out in the past, and how is it being done now?
- What specific incidents can you point to that illustrate especially good or bad OJT methods or results?
- How do you feel OJT should be handled, and why?
- What do you perceive to be the responsibilities of yourself, learners, learners' co-workers, and others in OJT?

**Customers.** Customers have their own perspective on OJT, based on the results OJT achieves. These perceptions are worthy of note even though customers are not often positioned to make firsthand observations about OJT. Customers can be asked such questions as these:

- Judging from your experiences with our employees, what did they do or not do that you found especially good or bad? (Describe a situation in which you were personally involved to illustrate your point.)
- What training would you recommend, and why?
- What pleases you most and least about the service you have received from this organization?

The purpose of an OJT program can be surmised from the various stakeholders' answers.

---

## Clarify Program Goals and Objectives

*Program goals* are the general results to be achieved. Goals are embedded in purpose statements. Rarely do they lend themselves to measurement or time-based tracking as program objectives do. Program goals for OJT might include:

- Slashing the length of unproductive breaking-in periods for newly hired, transferred, or promoted employees.
- Reducing reliance on sink-or-swim methods.

- Ensuring that learners receive work-related on-site instruction that is planned, scheduled, logically organized, and centered on meeting learners' needs.
- Increasing trainee and trainer accountability by clarifying precisely what OJT individuals received.
- Improving the match between the results people are supposed to achieve from their work and training plans and schedules that indicate how well individuals are prepared to perform their work efficiently and effectively.

These general direction-setting goals should be modified and prioritized so they address the pressing issues affecting your organization.

*Program objectives* stem from program goals. They answer such questions as these: How can achievement of the goal be measured? and What can be achieved over a specified time? Establish program objectives directly from program goals. Use an identifiable time horizon. Then state in writing the measurable program results that are to be achieved for each prioritized goal.

---

## Identify Program Customers

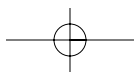
To be successful, an OJT program must meet or exceed customer expectations. But who are these customers and what do they expect? OJT customers can be found in any organizational group. They may be categorized by level (executives, middle managers, supervisors, professionals, technical personnel, clerical personnel, skilled labor, and unskilled labor), by function (purpose within the organization), or by relationship to the OJT program (learners, trainers, or learners' organizational supervisors). Indeed, OJT programs may also be designed to meet the learning needs of groups external to the organization—including suppliers, distributing wholesalers, retailers, or other groups.

However customer categories are defined, customer expectations of an OJT program are sure to differ depending on customers' individual needs. Thus, the following three customer-related questions should be considered at the outset of program development:

- What groups are to be served?
- What are their expectations?
- What priorities can be established?

### What Groups Are to Be Served?

Decide who will receive OJT. While the ultimate aim may be to offer OJT to all employees, that may not be possible upon program inception. Accordingly,



choose a target group, the category of people whose training is likely to benefit the organization most. Starting with that group will make an impact on the organization and provide future leverage and credibility to the OJT program. Possible groups to target include employees selected by job category or occupation, experience level, or special needs.

### **What Are Customers' Expectations?**

Do some brainstorming. Talk to members of the initial targeted group. Try to assess what they think about OJT. Do they have preconceived notions? Are they willing to listen to alternatives to "the way we've always done it"? How has OJT been handled with that group in the past? Write out the answers you find to these questions and then circulate them to group members and their immediate supervisors for comment. Use the results of this activity to help you clarify group members' expectations so that you have a basis on which to judge what you must do to meet or exceed these expectations.

### **What Priorities Can Be Established?**

Compare group expectations and desired objectives to the list of goals provided earlier in this chapter. Set priorities to establish the customer expectations that will be pursued.

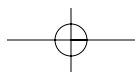
---

## **Formulate Program Policy and Philosophy**

Although few organizations have prepared a written policy and philosophy on OJT, there are sound reasons for doing so: first, to match program action with driving business issues or strategic plans; second, to establish a foundation for consistency in OJT activities; and third, to communicate responsibilities throughout the organization.

What should be included in a written policy and philosophy statement for an OJT program? The appropriate answer to that question depends on the competitive forces affecting the organization and on the program purpose, goals, objectives, and customer expectations. The policy and philosophy statement should address, at length, all the key questions posed for a purpose statement.

To write a policy and philosophy for an OJT program, form an in-house advisory council. If possible, invite representatives from different job categories and locations and from different organizational levels and perspectives. The advisory council should be prepared to discuss issues affecting the organization and clarify how the OJT program can address those issues. By making the preparation



of program policy and philosophy a council responsibility, you will build program ownership while also making it clear that the OJT program meets important organizational needs.

---

## Develop a Program Action Plan and Schedule

While a policy and philosophy provides general program guidance, a *program action plan* provides detailed descriptions of the activities that should be performed to achieve the desired program purpose(s), goals, objectives, policy, and philosophy. Without a program action plan of who should do what, there will be no accountability for results.

A *program schedule* flows from the action plan and provides detailed information about what activities should be performed and when. For instance, a program action plan might describe new OJT roles for supervisors, co-workers, and prospective learners. The corresponding program schedule would then indicate when the organization will teach individuals their new roles by conducting train-the-trainer workshops on OJT and train-the-learner workshops on on-the-job learning.

---

### Summary

In this chapter we provided advice on establishing a planned OJT program according to the following model:

1. Determine the OJT program's purpose(s).
2. Clarify program goals and objectives.
3. Identify program customers.
4. Formulate program policy and philosophy.
5. Develop a program action plan and schedule.

In the next chapter we offer advice on how to ensure the sound management and consistent results for a planned OJT program.