

500 WOODWARD AVENUE, DETROIT, MI 48226-3428  
P +1 313 964 3800 WWW.JWT.COM



# **Strategic Planning: Using Strategic Planning Guidelines to Design a Technical Training Program**

**By, Carol Bimberg, CPT & Tara Nida**

Article published in ASTD's OD/Leadership Network News -- a monthly online newsletter for the OD/Leadership community.  
Summer, 2005

## Strategic Planning Overview

Success in business requires a strategic plan to leverage an organization's strengths and resources in order to achieve the business goal. Success in managing a training program relies on the same principles. JWT Detroit is the Midwest arm of a large brand communication agency, with corporate headquarters in New York. JWT is the largest agency in the United States and works with clients like Ford, White Castle, Dominos, Kraft, Unilever, and more. The Detroit office has had a technical training department consisting of one to two staff people, depending on budget, since 1998. During this time, the department has serviced approximately 800 employees a year in offices across the US. Despite limited resources, the number of learning sessions (defined as one employee participating in a learning activity) tracked each year has steadily increased. With no increase in staffing and no significant budget increase, how did this growth occur? The answer is careful strategic planning. Clear and measurable objectives for technical training were determined by the training manager. Based on environmental inputs, a strategy was formulated and implemented. It is continuously evaluated and reevaluated.

Learning Sessions Tracked per year

YEAR	2000	2001	2002	2003	2004
# learning sessions tracked	1,556	1,609	2,045	2,370	8,887*

\* A special testing program was implemented in 2004, resulting in an unusually large volume of employees participating in online training sessions in preparation for the tests.

## Applying strategic planning to a technical training program

The following were the steps taken to create a strategic approach to training at JWT.

### Identify the objective

Studying JWT and what the agency did for its clients, it was immediately obvious that JWT had to present itself as "leading edge," keeping the clients a step ahead of the competition's web sites, TV ads, and other customer interactions. This required the employees to stay on top of the latest technology. To determine the specific objectives for the technical training program, the training manager sent a survey out to all employees. Questions centered on training content and training methods. Next, the training manager hosted a series of focus groups with mid-level and top managers. Based on the feedback, the following objectives were developed.

1. Training should be available for all major software applications in use at JWT, including PC and Mac applications such as Word, Excel, PowerPoint, Access, PhotoShop, and Illustrator.
2. Training should cover all levels of expertise, from beginning to advanced.
3. Training should be delivered in two formats: instructor led and self directed.
4. Training should be available when ever the employees were available to take advantage of it.

This was quite a set of objectives, considering there was one trainer on staff who was not an expert in all the listed applications. The next step was to examine the environment.

### Scan the environment. Understand the customer

At JWT, the employees were the trainer's customers. The customers were a diverse group of people, ranging from structured, traditional learners to free spirited, independent, learners. The pace was fast and the client's needs took precedence over everything. Most of the employees agreed they *needed* training, but few could or would commit to attend training at a specific time or date. This proved to be a challenge for a single trainer trying to design a program that would meet the objective of offering training on literally everything, exactly when it was needed.

*"When the arrow misses the target, it is never the fault of the target."* (anon) The question was how to hit the target with limited resources.

### Formulate the strategy.

When designing the strategy, the training manager focused on components and resources.

#### Components

- 1) *Instructor led classes*, for specialized skills not available in prepackaged training modules. Classes could be offered in two formats: 1.) Face to face in the Detroit computer training room, and 2.) via web conferencing
- 2) *Self directed training* modules on standard applications could be purchased and offered during Open Lab sessions. Modules could be organized in beginning, intermediate and advanced skill sets. Initially, this would be computer based training (CBT). Employees could come into the training room during Open Lab sessions and take exactly what they wanted when they needed it. CDs could be shipped out to the remote offices when requested. (Note: Self directed training eventually evolved into Web based training, WBT, available 24/7 and accessible from any location with Internet access.)
- 3) *One-on-one consulting* could also be available during open Lab hours. The training manager, naturally, did not have all the answers to all the questions, but through networking, had access to others, in and outside of JWT. They could be called on for help.
- 4) *Blended learning*. Components could be combined, giving the customers exactly what they wanted and needed. For example, self directed training covering general skills could be a prerequisite to an instructor led session that applied those skills to a specific, business problem.
- 5) *Learn faster by cheating!* A database of FAQs could be developed as the trainer and Help Desk staff determined the most common questions. Employees could access and search the records for answers to their questions. This could be an Electric Schoolhouse.

#### Resources

To meet the objectives, additional staffing would be needed. However, it was not an option. The training manager had to be creative in discovering, hidden, non traditional resources.

These would include the following:

1. *In house experts* who could be available to share expertise.
2. *Paid interns and non-paid interns and assistants*. Partnering with the University of Michigan Dearborn, School of Education, MA program in Performance Improvement & Instructional Design added resources while offering participants experience to list on a resume.
3. *Professional networking in order to obtain feedback on future proposals and plans*.

**Implement the plan**

The plan was approved. A cacophony of activity began, including, selecting a training vendor, initiating meetings, recruiting resources, developing classes, and marketing the program internally. Once in place, the evaluation process began immediately.

**Evaluate the results**

Evaluation started simple with level one surveys at the end of instructor led sessions. It expanded to include meetings with managers to discuss past learning sessions and recommended changes when implementing new training projects. In-house networking played a critical role in evaluation. The training manager joined committees and actively pursued invitations to critical meetings. Surveys played a key role in evaluation, along with an open door policy, inviting feedback, both positive and negative, in the spirit of continuous improvement. The technical training program was customer driven and this was clearly communicated. It became an effective partnership.

## Conclusion

As a brand communication agency, JWT believes that the consumer does not have time for advertising and is revolutionizing the way it interacts with consumers. JWT recognizes that time is the new currency and that we need to stop interrupting what people are interested in and *be* what people are interested in. This new way of thinking is making its way through all parts of the agency. Technical Training, specifically, understands that its “customers” – the employees – do not have time for training. With careful, strategic planning, it is giving the customers what they want, when they want it, in a way they will accept.

## Good resources

- **Quick MBA**, <http://www.quickmba.com/strategy/strategic-planning/>
- **Confirmative Evaluation** by Joan C. Dessinger and James L. Moseley.  
<http://www.josseybass.com/WileyCDA/WileyTitle/productCd-0787965006.html>
- **Performance Improvement Interventions: Enhancing People, Processes, and Organizations through Performance Technology**, by Darlene Van Tiem, Jim Moseley, and Joan Conway Dessinger <http://www.ispi.org/bookstore/pc/5116.htm>
- **GetAbstract**, <http://www.getabstract.com/>. Abstracts are 5-page summaries of the best and most relevant Business Books. GetAbstract is a growing source of business book summaries on the web. Search for the topic and read the abstracts of the latest books on the topic.