

## Leaders learn more than horse sense

by Teresa Pitman

For the third time, the brown horse named Cody drifts into the middle of the ring. Public relations consultant Susan G., who is trying to direct him through a series of cones on the ground, mutters under her breath in frustration: "Just when I think he is going to get it right he wanders off."

When Susan later reviews the exercise with Cody, she recognizes that the horse's behaviour is very similar to the problems she has with her staff. "I have three people working for me and they all seem to have the same problem. I don't want to micromanage every aspect of their work, but when I leave them to complete tasks on their own I find big gaps and important items left out and I end up having to finish most of it myself."

Susan is participating in the Equine Facilitated Leadership Experience, which uses horses to teach more effective leadership skills. Hosted by Campbellville, Ontario-based Birch Haven Farms [www.pdesigns.com/EquineLeadership.html] and headed by leadership trainer Sharon Quarrington and management consultant Bruce Craig, the workshop helps leaders identify the unspoken messages we communicate and learn about the horses' unique characteristics that provide insights into effective leadership, Quarrington says.

### Not just another gimmick

While using horses for leadership training might seem like just another gimmick, Quarrington asserts that it's

anything but. Horses have many qualities that leaders need, she says. For instance, horses are acutely sensitive to body language. The horse, in evolutionary terms, is a prey animal so horses survive by learning to be aware of the slightest sign of danger and to watch other animals around them closely.

Research shows that body language and our own assumptions and beliefs, often unspoken, have a powerful effect on the people we are trying to communicate with, yet many of us are unaware of the signals we are sending out. With horses, there are no words to confuse the issue. Horses teach you to be aware of your own body language and to be clear in the signals you are sending, says Quarrington.

### Different from other experiential training

There are many "experiential training" projects using rope courses, climbing frames and other inanimate objects. But horses are alive, with complex emotions and responses. Just like people, they are looking for leadership and partnership. "Working with horses requires the right balance between respect and trust," Quarrington explains. "If you are too aggressive with a horse, he'll run away or fight you. If you are too passive, he'll walk all over you – sometimes literally. Horses will quickly show leaders where they fall on this spectrum."

That's because horses give instant feedback. Staff members, on the other hand, might go along with their

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leader when he or she is being heavy-handed, giving mixed messages or being unclear, but they may complain later around the water cooler. A horse will signal instantly when a leader's approach is right – and when it's wrong.

### Better than a seminar

As well, unlike people, horses don't hold a grudge. "Even if their leaders push too hard, a horse will respond positively the instant the leader changes his or her behaviour. That's why there's a difference between listening to a lecture about leadership style and communication [or] the problems of being too aggressive or overbearing as a leader, and working with a horse who scoots to the other end of the arena when you are not listening or being too forceful or pushing too hard," explains Quarrington. Working with horses instead of sitting in a seminar gives leaders ample opportunity to practise changing their behaviour and to see immediately what works.

### Support and direction in equal measure

Quarrington uses a technique called "Natural Horsemanship" (similar to the one demonstrated in the movie *SeaBiscuit*). The technique is designed to unleash the horse's (or staff's) competitive spirit. It teaches leaders to find a way to be both supportive and directive in equal measure – without triggering the instinct for self preservation, she says. Bruce Craig puts it this way, "The skill is determining what type of leadership is called for – and making the right call. That's not easy, but that's the job of a true leader."

### Multi-sensory skills

At one of Quarrington's workshops a woman she had been working with over a period of time was brushing her horse in preparation for their work together. The horse was

unusually agitated the whole time she was getting him ready. Although at the start of the session the woman had said she'd had a great week, her horse seemed to be picking up anxiety. She confessed that she'd just learned she needed major surgery and had been worrying about it for days.

Leadership requires authenticity. Leaders must be truly in touch with their own emotions to be honest with themselves and other people. "Horses teach us how to do that because they're emotional sponges; they require us to tune into our senses and realize what unspoken messages we're sending," says Quarrington.

### From the ring to the boardroom

One key challenge for participants in the workshop is how to transfer what they've learned in the ring back to the boardroom. While in the ring with Cody, Susan G. has learned to identify the unspoken messages she's been sending and she's seeing results. "There was a moment when Cody suddenly began moving confidently, with long strides, in the direction I wanted. Sharon said to me 'What are you doing differently?' and I realized that I had become much clearer in my direction and was responding with far greater accuracy. That turned out to be the key," she says.

Back in the boardroom, Susan translates the lesson by meeting twice a week with staff to communicate assignments rather than by handing them out on the fly. The meeting also allows her to set priorities for the group, understand their concerns and issues and build a partnership with them. She breaks down tasks into smaller ones that can be completed successfully and provides instant positive feedback when a staff member is headed in the right direction. "You can learn a lot from a horse," she says.

### The equine experience teaches participants how to:

- demonstrate one's trustworthiness;
- communicate with clarity and consistency;
- read one's own body language and signals;
- understand others' perspectives – the basis of partnership;
- be firm and supportive when giving directions;
- build a partnership based on trust and mutual respect to engage co-operation;
- reinforce desired behaviour; and
- motivate others.

"When you can lead a horse around the ring without a rope or halter or anything else – this 1,200-pound animal following your lead – that creates a great feeling of accomplishment," says leadership trainer Sharon Quarrington. But that's only the beginning. With the balance of respect and trust achieved, participants learn to direct their horses and their staff to help them be more productive and co-operative, she adds.

There is no riding in these sessions, participants work with horses on the ground. There are regular time outs to debrief and to link behaviour in the workshop to what happens back on the job, so that insights are reinforced and immediately transferable.

## News

### Course wins international award

A new business course developed by the British Columbia Open University (BCOU) has been selected by WebCT to receive an Exemplary Course designation.

BCOU joins a select group of faculty and course designers from around the world whose courses have earned the designation from the highly regarded e-learning systems provider. In 2003, the six selected exemplary courses represent institutions in Canada, the United States, and the United Kingdom. BCOU's ADMN 361, Open Thinking received the highest possible ratings in the categories of course design, interaction and collaboration, technology, assessment, and learner support.

Open Thinking is delivered to students via the Internet over a 14-week period. The course examines strategic and creative thinking and demonstrates that neither is separate from the other. Students explore open thinking by practising techniques that encourage creativity, identifying strategies to broaden their approach to issues, and analyzing the context within which they traditionally think.

For more information, contact: Carissa McCart, manager, marketing & communications, Open Learning Agency, (604) 431.3012 or by e-mail at: carissam@ola.ca.



# Leveraging a facilitator's services: Part 1

by Michael Goldman

As a professional meeting facilitator, quite often I find myself in the role of educating potential clients on best practices around hiring facilitators. Too often, facilitators are hired for the wrong reasons or are not given the resources required, resulting in the client's dissatisfaction. On the other hand, the opportunity to add value through enhancing organizational effectiveness is missed if clients do not understand the value facilitators bring. Since facilitation is now being widely recognized in organizations, there is a valid case for users of this service to fine-tune their knowledge on what facilitation is all about. To begin understanding expectations it is best to discuss them in light of the three phases of facilitation.

### Three phases of the facilitation process

The three phases of the facilitation process include

1. Pre Facilitation
2. During Facilitation
  - a. setting the context
  - b. implementing the process
3. Post Facilitation

### 21 activities the facilitator should do

There are 21 basic practices that you should expect a facilitator to engage in at the various stages of a facilitation. Some practices/activities are obviously at your discretion and will depend on your budget, time, accessibility to participating stakeholders, and your willingness to be objective throughout the process.

### Pre facilitation

1. Engage in an initial "scoping" process whereby the facilitator helps you identify your team and/or organization's needs, wants, and expected results (goals/outcomes).
2. Create and present a contract for you to sign-off that contains all the important *terms of reference* regarding the specifics of the facilitation.
3. Engage in further data gathering beyond what you provide to ensure:
  - a) that your outcomes are in fact those that the rest of the group deems valid;
  - b) objectivity in the data collection process;
  - c) that any possible "hot buttons" are identified and accounted for pre-meeting.
4. Develop and have you ratify/modify detailed process notes that logically:
  - a) define the steps for the discussion;
  - b) overview "how" the steps will be achieved (i.e. use of tools, material requirements, etc.) and how steps are related to achieving your outcomes.
5. Recommend "fun" and interactive activities to ensure minimal participant fatigue and maximum participation.
6. Help you define what needs to be said to help kick off the event (i.e. your expectations of the group, session goals, defining your role, etc.)

### During facilitation: setting the context

7. Create appropriate expectations for what members can expect from themselves (establish operating norms for the session), and what

## news continued

### New tool to convert instructor-led courses to online

Macromedia has released a new educational tool called Breeze Live, a platform that rapidly converts existing instructor-led courses for on-line delivery.

Using Breeze Live, companies can train and communicate online in real-time through integrated presentations, video, audio, and desktop screen sharing. The platform provides a complete solution for companies to create, manage, deliver, and track rich multimedia training throughout the enterprise. The product enables global enterprises to deliver a single interactive experience simultaneously to all of their employees and has the capability to immediately train and qualify employees on everything supporting the company's revenue-generating capability, thus reducing the training cycle and enhancing a company's ability to compete.

For more information, contact: Leslie Whitelaw, G2M PR for Macromedia, (416) 642-6358 or by e-mail at: [leslie.whitelaw@g2mpr.com](mailto:leslie.whitelaw@g2mpr.com), or visit: [www.macromedia.com/go/breeze](http://www.macromedia.com/go/breeze).

participants can expect from the facilitator (i.e. guiding group discussion, acting as referee, helping people stay on purpose, etc.).

8. Roughly define the process that the group will be going through to ensure understanding of the discussion steps using visual aids wherever possible.
9. If helping the group to resolve problems or make decisions, the facilitator explains how she/he will go about testing for consensus.
10. Identify the overall meeting purpose and/or agenda item purpose, and test for clarity to ensure all participants understand the boundaries and intent of the discussion

### During facilitation: implementing the process

11. Implement the process as ratified.
12. Use the flipchart/whiteboard to capture participant information in a way that makes minute-taking straightforward and easy to understand.
13. Make frequent process, progress and pace checks to ensure the meeting purpose is being achieved.
14. Work the group towards reaching a consensus even though it appears to be resisting closure – the facilitator will use a variety of techniques to help the group move past its resistance!
15. Ask tough questions that “peel-the-onion” on issues for purposes of determining underlying causes. This is the only way issues truly will get resolved.
16. Provide insights on the group's process in terms of how members interpersonally interact versus carrying out the decision-making/problem-solving task.
17. Ensure the group comes to closure before moving on to another topic.
18. Review the actions set in the meeting to ensure clarity and help the group define its next steps before closing the meeting (focusing on “sidebar” discussions and/or issues that still require closure).
19. Provide for feedback regarding the session or your performance at the end of the session.

### Post facilitation

20. Follow up with you to determine how things are going (one to four weeks post-session). Be prepared, however, that if you require a formal follow-up compensation will be expected on the part of the facilitator.
21. Help you determine what your next steps should be with or without the use of the facilitator's services.

As the points above illustrate, facilitators focus on process; that is, they guide the group through the norms, activities and interpersonal issues that support the visible goals of any facilitation. Leveraging a facilitator, then, entails providing the facilitator with more than just background information on the explicit issues at hand. Depending on the scale of the facilitation, interviews with group members, discussions with relevant executives, and ratification of the process all contribute to a successful facilitation.

*This is the first of a three part series outlining the roles and responsibilities of all the stakeholders before, during and after a facilitation. Part Two will include survey results re hiring trends for facilitators amongst internal HR people. And Part Three will look at what clients need to do to ensure optimization of a facilitation.*

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news continued

### Root Learning earns *Training* magazine's readers' APX Award

Root Learning, Inc., an international provider of learning, communications, and change management solutions, has announced that its sales force training services have been reaffirmed via one of the industry's highest accolades: the 2003 APX (Achieving Performance eXcellence) Award from *Training* magazine. The award — given not by judges or editors but by the magazine's readers — recognizes training industry vendors who provide the best products and services in the marketplace.

For more information visit:  
[www.rootlearning.com](http://www.rootlearning.com).

### 2004 *Training* Top 100 awards

*Training* magazine is now accepting entries for its annual *Training* Top 100 Awards. Companies known for their in-house training and development initiatives and/or excellence in harnessing human capital are invited to apply. Training providers who would like to nominate their clients may also apply.

For details, visit  
[www.trainingmag.com](http://www.trainingmag.com) and click on the Top 100 logo in the right column.

## STUDY

# Smaller firms make major headway in training

New research findings show there has been steady and significant improvement by the small business sector over the past few years in providing job training for their employees.

A report released in May containing information based on surveying by the Canadian Federation of Independent Business (CFIB), shows 56% of smaller firms have had an increase in their time and money invested on employee training during the past three years. Another 34% of respondents reported no change, while eight percent said they did not know and only two percent indicated a decrease in their investment on training during this time. When looking ahead, almost half of respondents — 48% — said they expect to increase the amount of training over the next three years.

### Momentum is growing

"These findings are very significant," said CFIB president Catherine Swift, "as they clearly show that the training trend within this sector continues to grow and gather momentum. The new information also reveals that a strong majority of small- and medium-sized businesses provide training for their employees by various means. For example," said Swift, "43 percent of small business owners provided a mix of formal and informal training, while another 43% have given just informal training and only one in eight offered nothing in this regard." She said formal training could include classroom courses, seminars and workshops, while informal training consists of on-the-job training, tutoring and mentoring.

Swift said the study also shows small businesses average 113 hours of informal training and 23 hours of formal training per year for a new

employee. "That represents well over three 40-hour, full-time weeks per new employee and a significant investment of time and money for the firm's owner," said Swift.

Reasons pushing businesses to promote training among their employees vary. Two thirds of small firms indicate that they train in order to quickly integrate new hires, to be more competitive or to upgrade under qualified employees. About half of respondents say they need to train their employees in order to update skills for new technology. Employee retention is another important reason for training cited by employers. One-eighth of respondents said replacing retiring employees and addressing gaps in basic education skills are also reasons prompting them to train their staff.

When asked about the responsibility for training, 54% of SMEs are of the opinion that responsibility for training their personnel lies mainly with themselves. "This commitment is well in keeping with the sense of responsibility and self-reliance that is at the heart of entrepreneurship," said Swift. However, she pointed out that other stakeholders also have a role to play in supporting employers and employees. CFIB research shows that there are many strategies available to government to encourage small businesses to provide more training, like reducing payroll taxes and other profit insensitive taxes like Employment Insurance (EI). One-third of respondents also said they would be encouraged by better partnerships between businesses and the education system, while one-quarter said they could use help in finding training information and resources.

*The Labour and Training Survey was conducted by CFIB between September 28 and November 15 of 2002, and drew 6,740 respondents. The national results are accurate to within +/- 1.2 percentage points, 19 times out of 20. For more information, visit [www.cfib.ca](http://www.cfib.ca).*

# Not enough time for training: resolving the dilemma - Part 2

by Mary C. Janak

“My job is my career development,” said several employees in a high-tech workplace when asked if they would be interested in attending training for their professional development. What they meant, they clarified, was that between the long hours they put in to meet their deadlines and their desire to have some measure of balance in their personal lives they had no extra time for training.

Last month, in Part One of this two-part series, I recommended that trainers do a reality check on their own thinking to make sure they are not themselves contributing to the corporate belief that there’s not enough time for training. This month, I provide examples of initial successes gained through using new training approaches that better integrate training with the business needs of first-line managers and employees.

Facing facts such as consistent no-shows for classes in my previous job as a senior internal trainer with a national corporation, I realized that many first-line managers and employees valued immediate, short-term production over training. It was easy for me to see that we trainers would have to change our approach to the way we delivered training if we wanted to succeed in serving our customers.

Also, I noticed our first-line customers used two main criteria to assess the effectiveness of the training they did attend. One was *word-of-mouth* – what participants told fellow employees about the training after they were back on their jobs. The other was *actual performance* – could people perform a new task or demonstrate a new behaviour on the job? And how long was it before they consistently performed at a higher skill level?

Realizing the path to success lay not in fighting these two criteria and the value on production over training – but instead, in figuring out a creative way to meet it, I initiated and piloted several new training strategies with input and support from a key client and my team. These strategies included:

- Developing shorter, more versatile training called Just-In-Time (JIT) training; and re-organizing two- and three-day, back-to-back classes into one session a week.
- Designing training based *first* on performance objectives, instead of

learning objectives. (I used the objectives listed in the employee performance appraisal and, at times, the department’s goals and objectives.)

- Defining visible behaviours that demonstrated intangible competencies such as customer service, leadership and taking initiative.
- Teaching the tool first (use), and concept and process only if needed and if time permitted.
- Incorporating on-the-job and problem-based learning strategies into instructor-led classroom design; and electronic media when appropriate.

These pilot activities were conducted alongside regular classroom training for about a year. Towards the end of the year, we started seeing signs of success in terms of reduced training hours, consistently high average class ratings for shorter training modules and an increasing number of customer requests for the new JIT training. The time for several classes was reduced from one full day to four hours; and some four-hour classes were reduced to two hours.

Also, we received consistently high Level-One average ratings for JIT training, and the several-day classes conducted over one or more weeks. This indicated to us that shorter trainings were just as successful as longer classes. In some cases, the one- and two-hour modules were even more successful in terms of the benefits participants told us they received from them.

Clearly, these new strategies are just a beginning. As both external and internal trainers, we stand at a doorway into a “brave new world” of opportunity to re-invent our profession to provide even greater, and more meaningful, support to the clients we serve.

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# Lost in the translation: misadventures in international training

by Byron Kalies

It's November - it's cold and it's snowing. It's the Ukraine. I've just spent five days training in a sanatorium in Khmelnik. I haven't slept properly for days; (it got noisy at night in the sanatorium). I haven't talked to my family for seven days - the sanatorium doesn't "do" telephones.

I go to the "town" of Khmelnik to try to find a telephone. I try the post office - it has a picture of a telephone in the window.

I disturb a 60-year-old woman talking to someone on the phone. "Do you speak English?" "Angleeskee? London?"

"Niet!" she spits.

I point to the three public telephones and make the international gesture of the tourist who hasn't got a mobile phone - a clenched fist pressed to my ear. "Da," she says and continues talking.

I look at the phones. But there's nowhere to put any money. I have no idea how it works. I look over at the woman. She shrugs and talks on. I walk out, defeated.

I haven't drunk coffee for a week. I did ask if I could have coffee instead of the tea or the stewed fruit juice - only to be met with a stare and a "Maybe later." But "later" never arrived. I've been living on the vegetarian trainer's international meal - beer and salted peanuts.

Next it's on to the overnight train from Kiev to Kharkov. "They always arrive on time" - the Ukrainians proudly boast. I now know why. It's a 300-mile journey and it takes eight hours. I could walk faster. I'm in "first class" (which means that there are only two of us in the coffin that passes for a carriage). I desperately need to go to the toilet but I've seen the toilet and I'd rather not see it again. Rob, my fellow trainer is snoring - loudly.

## Two days later

It's 9:00 a.m. on the first day of Strategic Management and People Management for 14 Ukrainian senior statisticians. They're here for a

week. They stumble in. You can feel their eyes glazing over already. The first translated question I get is "What time's coffee?"

"O.K. - welcome to five days of Strategic Management and People Management Skills." You can almost feel the life being sucked out of them. I battle on. "My name's Byron Kalies and I live in England. But I'm not English - I'm Welsh." I pause while the translator does his work. "Has anyone heard of Wales?" Silence. "This week will be hard work but we intend to have fun." As the word "fun" is translated, there's a collective groan. They've obviously been on fun courses before. So have I and I know how they feel.

I decide to begin quickly and introduce my "training partner" Rob. Sharp intake of breath and some sniggering from participants. Three days later I find out the translation implied we are lovers. The misunderstanding was further enhanced when Rob refused to use anything but a blue marker pen. In the Ukraine "blue" is a slang expression for gay.

"Let's split into pairs and introduce each other. Here's a list of questions which will help you discover some more information about each other: name; where you work; greatest success; what do you do in ten words or less."

The exercise - designed to take half an hour, takes all day.

I hear my four-year-old daughter's voice, "So daddy, tell me again why you wanted to be a trainer?"

*This is the first in a series of articles about the mishaps and foibles of international training. Look out for more misadventures in upcoming issues. If you are interested in submitting your own tales of training trials and tribulations, send an e-mail to the editor, Celène Adams, at: [celeneadams@hotmail.com](mailto:celeneadams@hotmail.com).*

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# Toronto anticipates labour shortages

## Educational and training institutions called on to improve labour force development

Toronto's economy is well positioned for growth as a producer of knowledge-based goods and services, but growth will be constrained unless the city deals with serious labour shortages expected by the end of the decade, according to a study conducted by the City of Toronto's Economic Development Division, between May 2001 and November 2002.

To resolve the shortfalls, more work needs to be done to attract highly skilled immigrants to Toronto, to establish the necessary supports for the smooth integration of immigrants into the labour force, and to improve Toronto's skills training system. These are the main findings of a report presented to City Council's Economic Development and Parks Committee.

"Toronto has a bright future as a global centre of the knowledge-based economy, but only if all levels of government, educational and training institutions, business and labour work more closely to improve the labour force development system," said Councillor Denzil Minnan-Wong, Chair of the Committee.

The report found that Toronto has a very highly educated, highly skilled and culturally diverse labour force, providing a strong foundation for future economic growth. More than three out of four employees in the services sector have post-secondary education, as do more than half of Toronto's manufacturing employees. In the decade ending in 2010, employment in the Toronto region will grow by 400,000 to just over three million, representing a 13% increase. There will be growing demand for labour in all skills groups, and especially

in occupations that require a university degree, community college or apprenticeship training, or a high school diploma.

However, Toronto will begin losing a major share of its workforce after 2008 as members of the baby boomers retire. As a result, the Toronto region will face labour shortages across all occupations and skill groups by the end of the decade. To make up the shortfalls, Toronto will need to rely on immigration as a major source of new entrants into the labour force.

To respond to the problem, the report calls on governments, educational and training institutions, business and labour to work together to implement changes, including: - making the training and skills development system more flexible and adaptable so that it is better able to respond to economic change; more involvement by employers in providing skills upgrading, and better links between employers, educators and trainers; improving access to training for youth who do not continue on to college or university; expanding and improving immigrant and migrant resettlement programs in Toronto; reversing federal policies that seek to disperse immigrants away from Toronto to other places in Canada; and creating a more integrated labour force development system in Toronto. Next steps include consultations to refine and prioritize the recommendations, and to build partnerships and alliances to implement them

*To view a full copy of the report, visit [www.toronto.ca/business](http://www.toronto.ca/business).*

# Financial literacy training: key to managerial career success

by Jason Orr

Recently, while delivering a financial literacy course to a group of general managers, one of the participants asked me why financial literacy was relevant to his job. "A fair question," I thought to myself, and I proceeded to answer it by inviting the group to consider the following scenario.

You've just returned to your office on a blustery Monday morning after vacationing in Acapulco. As you settle back in your chair, still revelling in the memory of tequila shooters, your phone screams out, startling you back to reality. It's your boss. He tells you he'll be meeting with the president in thirty minutes to discuss your department's financial results. But instead of inviting you to explain (or defend) your performance, he nonchalantly tells you that one of the bean counters from accounting will attend the meeting to speak on your behalf. "After all," he quips, "without a basic understanding of your numbers, you might confuse the facts and sound the alarm bell."

At this point, I turned to the group members and asked them how their president likely would have interpreted their absence from the meeting if this had been a real-life scenario. Then I asked them whether some degree of financial acumen would improve a manager's chances for career success? Their collective smile reassured me that they got the point.

A manager's job is quite straightforward: maximize shareholder wealth. And when managers help their organizations make money by allocating resources in the most efficient and effective way possible, they are maximizing shareholder wealth.

Managers (as well as all other employees responsible for financial decisions) must understand what financial impact each decision will have *before* they make it. It's too late to lament a bad choice after it's been made. Each and every decision must be analyzed in order to maximize shareholder wealth.

## What is financial literacy

Managers aren't born with a natural aptitude for interpreting an income statement or preparing a budget. But it's a skill that can be learned just like any other. How many people are agile enough to ride a bicycle the first time they hop onto the seat?

Financial literacy is all about a way of looking at financial data. It's about understanding how decisions are recorded on financial scorecards that organizations keep track of. It's about understanding the accounting terms that financial people throw around in budget meetings. It's about understanding how numbers reflect the good, the bad, and the ugly of every business decision a manager will ever make. And contrary to popular belief, being financially literate has nothing to do being good at mathematics!

## How financial literacy training works

Financial literacy training begins with building self-esteem. A financial literacy training program should begin by developing a "can do" attitude before the participants move on to learning core skills and knowledge. To help them build confidence, it's beneficial to relate financial concepts to scenarios that are familiar to them on a personal level. For example, a trainer might explain that the balance sheet represents a mathematical formula:  $\text{Assets} = \text{Liabilities} + \text{Equity}$  (no complicated math here). If you paid \$250,000 for your house (an Asset), and your mortgage is \$150,000 (a Liability), the Equity in your house would be \$100,000. The participants can immediately see the application of this financial concept to everyday life.

## Application of financial literacy skills varies

Financial literacy means different things to different organizations. Whether

in the context of a public corporation with an overriding profit objective, or a non-profit association that is content to break-even, the principles of finance and accounting remain the same. However, the application will vary. A financial literacy training assignment might ask clients the following question: "What do you want your employees to do after the training that they cannot do now?" The answers to this deceptively simple question are usually: "We want them to prepare more accurate budgets" or "We would like them to understand how our company makes money." With some firm objectives in hand, a trainer is then in a much better position to recommend and design a program that will meet clients' needs.

Occasionally, a client will focus on the symptoms of a problem, rather than identify the underlying root cause of a performance gap. A trainer's job is to help the client to separate cause from symptom. For example, not too long ago, I was faced with a particularly daunting task when a client asked me to teach a group of directors how to spend the organization's resources more efficiently. "Cost control is the order of the day," I said to myself. These directors, however, also had to ensure that their departments were not left with any operating surplus at the end of the year. They were effectively operating with a "use-it-or-lose-it" philosophy. If they ended the year with a surplus, they reasoned, they wouldn't receive the same level of funding in the upcoming budget year.

With further analysis, it became apparent that the learning objectives for this assignment were two-fold:

1. to help the directors develop an understanding of budgeting and control techniques; and
2. to provide them with the tools to prioritize competing programs using return on investment (ROI) measures. A follow-up coaching component was added to the program to encourage them to implement what they had learned.

The bottom line? When managers understand numbers their confidence and abilities grow — right along with your organization.

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*Jason Orr, founder of Optimal Performance Group and author of How To Make Your Numbers Talk, specializes in helping non-financial managers make more profitable business decisions by improving their financial literacy skills. Contact Jason at: (416) 504-2969 or through his website at: [www.opglearning.com](http://www.opglearning.com).*

## Blended learning gains approval in U.K.

Acceptance of blended learning is on the rise in the United Kingdom (U.K.) as organizations seek flexible, cost-effective training solutions. New research from QA, a U.K. provider of training and consulting, found that 81% of organizations surveyed believe blended learning is an effective means of learning.

The independently analyzed report surveyed more than 1,700 training buyers and delegates to ascertain their major views on training provision.

Blended learning employs an appropriate mix of delivery media such as classroom training, Web-based training, virtual classrooms, books and mentoring to create flexible, cost-effective solutions that ensure individuals achieve the optimal learning experience and develop their skills to their maximum potential.

David Pardo, QA's director, IT skills research, commented: "Our own research has found significant resistance, on the part of both IT professionals and end users, to the use of e-learning as a straight replacement for instructor-led training. But there is a growing acceptance that the ideal solution is one which capitalizes on the respective strengths of classroom, e-learning and other delivery media to provide a flexible, integrated blend."

The research also exposed significant regional variation with 85% of Scottish clients preferring training in the classroom with only 63% of London-based respondents preferring this method.

Management and professional skills have also increased in importance, the survey revealed. Sixty-four percent of respondents believe that these skills are essential for employees, compared with just 49% in the same survey in 2002. The result reflects a growing awareness of the importance so-called "soft skills" for building productive teams and ensuring effective communication across organizations.

For more information, visit: [www.QA.com](http://www.QA.com).

# Training analytics and human capital ROI

For decades organizations have struggled with the real costs, benefits and ROI of training. Using new tools and technology now available, organizations can apply business analytics to understand the activity, effectiveness and impact of e-learning and training. Enter analytics.

Analysis requires data. If your organization has implemented some kind of LMS that houses enrollments, completion data, scores, certifications, etc., then you have the basis for an analytics system. It's important here to note the difference between analytics and reports. Most LMS systems have built-in reports. Although reporting tools are important, they alone do not provide the information for building a compelling case for training. Instead, a report should be the result of an analysis. Before you can create a report, you have to dive into the information and separate or distinguish the component parts of training initiatives and results to discover inner relationships. From there you can create a report to view that information regularly.

This concept of analytics leads us to a software solution that allows an organization to understand what's going on in its training and e-learning operations. Because organizations can't manage what they don't measure, it is important to establish the right performance measures for all key investments. Learning is without a doubt one of the most important investments any company will make.

To measure the impact of learning, the solution should answer basic business questions, such as:

- How much did something cost?
- What were the components of the cost?
- Who took or completed a learning offering?
- What was the business impact of the training/learning?
- What can we do to improve it?

In addition, a training analytics solution should provide different users with the information they need to make decisions, as, depending on their jobs, they use information for different purposes.

## Training measurement best practices

There are several key elements to consider when developing or perfecting any business measurement methodology. Here are five best practices related to training and ROI measurement:

1. **Ensure the measurement process is replicable and scalable.** Organizations tend to spend thousands of dollars on one-off projects to measure a training program in detail. This information is collected over many months with exhaustive use of consultants and internal resources. Although the data is powerful and compelling, management often comes back with a response such as "great work, now do the same thing for all the training." Unfortunately, such one-off measurement projects are rarely replicable on a large-scale basis. So don't box yourself into that corner.
2. **Ensure measurements are internally and externally comparable.** Related to Point One is the concept of comparability. It is a significantly less powerful endeavour to do a one-off exercise when you have no base line of comparability. If you spend several months calculating out a 300% ROI on your latest program, how do you know if that is good or bad? Surely a 300% ROI is a positive return, but what if the average ROI on similar training programs is 1000%?
3. **Use industry-accepted measurement approaches.** Management is looking to the training group to lead the way in training measurement. It is the job of the training group to convince management that its approach to measurement is reasonable. This is not unlike a finance department that must convince management of the way it values assets. In both cases, the group must ensure the approach is based on industry-accepted principles that have proof of concept externally and merit internally.
4. **Define value through the eyes of your stakeholders.** If you ask people what they mean by "return on investment" you are likely to get more than one answer. In fact, odds are you'll get several. Return on investment is in the eye of the beholder. To some it could mean a quantitative number to others it could be a warm and fuzzy feeling.
5. **Ensure your metrics have flexibility.** The last thing you want to do is roll out a measurement process that is inflexible. You will likely have people who want to view the same data but in many different ways. You need to have designed your database to accommodate this important issue, thereby creating measurement flexibility.

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# Voice mastery: boost communication retention

by Nancy von Hapke

In a face-to-face training session or in a sales or customer service opportunity, the person you are speaking with determines her or his willingness to communicate with you in fewer than five minutes. Over the telephone, this decreases to 15 seconds. Further, most people are untrained listeners, who only retain one quarter of what you say.

Voice mastery and visual language workshops teach you how to cross over the 15-second barrier and how to control the quarter of the conversation you want people to retain.

## The verbal touch technique

My own voice mastery workshop is designed for individuals who want to communicate more effectively over the telephone, while my visual language workshop is for those who need to communicate more effectively face-to-face. Results are obtained through a communication technique that we designed called the “verbal touch technique.” This technique teaches you how to impart your message by stimulating customers to listen, and by keeping their attention through personal voice manipulation.

To understand the verbal touch technique, we first need to break down the three components of communication: voice; body language; and the words we speak. In a face-to-face conversation, the voice represents 38% of the message being heard, body language 55% and the words we speak only 7%. Over the telephone this changes dramatically: the voice represents 87%, body language 0% and the words we speak 13%.

In both cases, the voice represents one of the most powerful components of communication. As a trainer, you speak for a living and so have to be upbeat, knowledgeable and experienced. Much of your confidence is conveyed through voice and the verbal touch technique teaches you how to master your delivery.

It works by awakening people’s minds at any given moment, sparking them to listen to what you’re saying. In a workshop, you learn to manipulate the components of your voice to catch your listeners’ attention, which results in them retaining and comprehending the key elements of the conversation.

Most people speak so they might be heard; voice mastery workshops

teach you how to speak so that others want to listen.

## Workshop overview

All good voice mastery workshops should contain a voice-strengthening component where participants can focus on exercising their voices, learn voice-control techniques and receive one-on-one coaching. Self-voice evaluation cassette recordings and group practice are also valuable parts of a voice mastery workshop. If the workshop contains a visual language module, it will also teach you how to make sure your body language is congruent with your words and tone and respects your customer’s comfort zone. In addition, in our workshops, individuals learn how to stimulate listeners using the verbal touch technique.

For example, a speaker must know how to apply the five elements of the voice, at the right moment within a conversation. These five elements, pitch, pace, pause, volume and tone are used regularly in our every day conversations but are sometimes taken for granted or misused. Your voice is a window into your feelings and emotions at any given moment in time. Your volume gets louder when you are angry; your tone changes when you are happy or sad; and you speed up your rate of speech when you are excited, nervous or in a hurry. These elements, without you necessarily being aware of it, control the outcome of your conversations.

## Results

How many times have you received a call from someone you just spoke with asking you to reiterate the contents of your previous conversation? Or perhaps a client behaves in a way that indicates he or she hasn’t understood an issue you discussed or the resolution you thought you’d jointly arrived at. Practising voice mastery skills will result in fewer such miscommunications because it will improve people’s retention rates — not to mention giving your own confidence a boost!

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*Nancy von Hapke is president of 3D Training and Marketing. Contact Nancy at (416) 694-6516 or by e-mail at [nancy@3dtrain.com](mailto:nancy@3dtrain.com), or visit: [www.3dtrain.com](http://www.3dtrain.com).*

# EVENTS

## September 30 - October 1 **Best Practices in Instructional Design & Curriculum Development for Internal Training Organizations**

This three-day conference offers several workshops in developing and implementing performance measures for instructional design, as well as eight case studies re corporate universities and other training organizations. Several keynote speakers will deliver presentations.

Fee: various

Org.: IQPC

Place: Las Vegas, NV

Tel.: +44 (0) 207 368-9514

E-mail: Rachel.Turner@IQPC.co.uk

Web: www.iqpc.co.uk

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October 7 and 30

## **What It Takes To Listen**

In this workshop, offered on two dates in October, you'll learn how to feel less guilty about not listening perfectly and become more responsible for listening well. You'll learn how to use listening to improve your workshops by studying: the three most important intentions to improve your capacity to listen; how we all have listening

preferences; the four levels of questioning; cues that tell us we're listening or being listened to; and the four tools for listening during conflict.

Fee: \$399 (early bird and multiple participant specials available)

Org: Suzuki & Associates

Place: Toronto

Tel.: (416) 221-1462

E-mail:

info@thebusinessoflistening.com

Web: www.thebusinessoflistening.com

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October 23

## **Leading Successful Organizational Change**

Based on the work of John Kotter and William Bridges, this interactive one-day leadership training program applies a step-by-step change roadmap and incorporates a wide range of tools and methods organized into each step. These tools range from change role mapping, to visioning, to assessing readiness, to communicating change, to leadership style, to personal transition stages, to large-scale involvement methods, to strategies for maintaining momentum. This program can be critical for senior managers, change sponsors, project leaders and change champions/facilitators prior to implementing a

specific business or organizational change. As well middle managers and change sponsors and champions can benefit from having a common toolbox and series of steps to follow.

Fee: \$475

Org.: Participative Designs Inc.

Place: Toronto

Tel.: (905) 659-9292

E-mail: bcraig@pdesigns.com

Web: www.pdesigns.com/leadingchange.html

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November 12 – 13

## **CSTD Annual Conference & Trade Show**

The Canadian Society for Training and Development's annual conference and trade show presents interactive workshops in four tracks; sessions for both new and experienced trainers; the latest training products and services; and opportunities to meet peers and exchange ideas. Two special "conference within conference" features include "e-learning" and "evaluation and measurement". Keynote speakers include Dr. Jack Phillips, the world's leading expert in training and performance impact measurement, who will also conduct a post-conference workshop.

Fee: \$1,444.50 (members)

Org. CSTD

Place: Metro Toronto Convention Centre, Ont.

Tel.: (416) 367-5900

E-mail: info@cstd.ca

Web: www.cstd.ca

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November 11 – 14

## **Mastering the Art of Instructor-Led Training**

This course is designed to give you the power to make any instructional presentation a success. Expert instructors with years of experience in this field conduct the three-day workshop. Instructors will provide feedback tailored to your specific needs throughout the workshop.

During the workshop, you work on your own material and deliver three videotaped instructional presentations for one of your courses. You'll gain the skills and confidence you need to succeed through practice in a safe, supportive learning environment. Fee: \$1,650 (U.S.) (discounts available)

Org.: The Center for Effective Performance

Place: Atlanta, GA

Tel.: (800) 558-4CEP

E-mail: info@cepworldwide.com

Web: www.ceppress.com