Skills Adoption Toolkit

Canadian Management Centre®

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Introduction

Canadian Management Centre has been creating innovative, award-winning learning solutions that help organizations succeed since 1963.

It is our intent to make our training exceptional with proven content and learning design, experienced facilitators and project support that make life easy for our clients. However, simply taking great training is not enough to ensure skills adoption and transfer of skills.

At CMC we care about enabling our clients to be successful in the medium and long term.

Our Skills Adoption Toolkit is designed to help clients support your training events with activities Before, During and After to enable your teams to build confidence in using their new skills and promote a positive change in behaviour.

The ten tools in this toolkit will help your leaders build confidence in using new Leadership skills as well as the application of the training connecting directly to your organizational priorities.

The Skills Adoption Toolkit begins with Implementation Road Map (p. 3) to guide your planning and an Engagement Model (p. 4) that is an excellent standard for implementing organizational change initiatives. The Engagement Model itself can be used for planning and or as a quick assessment on how your implementation is progressing.

All our clients have unlimited access to the Adoption Toolkit and resources. Should you wish our help in planning or project managing a significant Training implementation please reach out to us. We would be happy to discuss this with you.

All the best!
Your CMC Team!

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Implementation Planning

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Engagement Model

DEFINE		ALIGN		EXECUTE		OUTCOME
Clear Vision	Compelling Reason	Leaders Demonstrate Commitment	Value to Learner	Knowledge Skills	Processes Systems	*It's Successful*
	Compelling Reason	Leaders Demonstrate Commitment	Value to Learner	Knowledge Skills	Processes Systems	*It's not permanent*
Clear Vision		Leaders Demonstrate Commitment	Value to Learner	Knowledge Skills	Processes Systems	*It's not urgent*
Clear Vision	Compelling Reason		Value to Learner	Knowledge Skills	Processes Systems	*It's not important*
Clear Vision	Compelling Reason	Leaders Demonstrate Commitment		Knowledge Skills	Processes Systems	*It's not worth it*
Clear Vision	Compelling Reason	Leaders Demonstrate Commitment	Value to Learner		Processes Systems	*It's not possible*
Clear Vision	Compelling Reason	Leaders Demonstrate Commitment	Value to Learner	Knowledge Skills		*It's not effective*

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BEFORE

Insights and tools to plan, communicate, and prepare your organization prior to training.

This phase ensures your leaders understand how learning activities will support organizational and individual goals & objectives. And how leaders will be engaged and equipped to support the learning and development.

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Tool #1:
Measuring Training Outcomes

You can only determine the success of your investment in employee learning and development by measuring the impact of the training intervention. To maximize your results, measurement and evaluation should happen multiple times—immediately post-training as well as after participants have had time to apply and integrate the new skills on the job—and use multiple methodologies.

The template below is a starting point for pinpointing the outcomes you seek and planning how you can accurately and efficiently evaluate those outcomes. Below, you will find questions and considerations to guide your planning.

BEFORE

Desired Outcome	Leading Indicators	Measurement and Evaluation
Define the training outcomes using specific, measurable statements and action verbs, such as define, explain, demonstrate, implement, apply, etc.	Identify the metrics that can indicate the training impact: e.g., manager's observations, employee's self-report, employee retention numbers, complaints received, engagement survey results, etc.	Decide what data will be collected and what methods employed to evaluate the impact of the training: e.g. surveys or interviews, skill observation checklists, performance reviews. Determine whether this data is already being collected and, if so, how to access it.
Responsible Party	**Timeframe**	**Notes/Other Considerations**
Who is responsible for gathering, interpreting, and presenting information related to training outcomes, indicators, and measurements? If responsibilities are divided, how will those involved work together effectively?	When will the outcomes of the training program be measured? If multiple times, with what frequency will measurement take place? Do pre-training data sets or surveys exist and, if so, how can these be leveraged to show training impact?	What other stakeholders are involved and how? Who needs to be kept informed? What else needs to be considered?

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Tool #2:
Communicating the New Initiative and Getting Buy-In

An important element to ensure your new development initiative succeeds centers on messaging and early and frequent communication. Learners need to know that the training will be more than an event. They need to know it will be an ongoing development effort that will help them be more effective in the workplace and help the organization improve business results. Managers need to understand their role in supporting their staff. Investing in early planning to develop your messaging and communication plan will pay dividends in the end.

We recommend assembling a cross-functional team (Executive Sponsor/Committee, HR, Managers/Functional Leaders whose members will receive the training) for input and to help plan the messaging. Below are some thought starters for the team to work through.

When should we start?	• Ideally 1 month before the first training event
Who should have input into the messaging?	• Executive Sponsor/Committee • HR • Managers/functional leaders of areas whose team will receive the training
Questions to help formulate your messaging	• Why are we undertaking this learning initiative now? • What is the value of this learning for our organization? For our customers? • What are the benefits to the participants (e.g., personal credibility, need to improve their own performance, potential career advancement)? • What support can participants expect from the organization? • What support can participants expect from their manager? • What expectations does the management team have of participants?

BEFORE

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Tool #3:
Sample Communication Plan

The answers to the questions on the previous page should form the basis of all communication regarding the initiative. In addition to clear messaging, effective communication plans include specific communication activities, clear target audiences, best execution methods/media, and clearly identified owners. Here is an example that can help you organize and execute a communication plan.

BEFORE

Week	Purpose	Activity	Audience	Key Message(s)	Media	Owner
1	Awareness	Executive Steering Committee Meeting	Senior Leaders	• Senior Leader role • Benefits to company	Face-to-Face	Enablement Team
2	Awareness	Short Article	All	• Case for action • High level preview of program	Intranet	Internal Communications
3	Awareness	Highlight in Monthly Recording	All	• Case for action • Benefits to company	Example: CEO's update	CEO/Internal Communications
4	Commitment	Senior Leader Staff Meetings	Managers	• Manager role	Face-to-face	Senior Leaders
5	Commitment	Manager Readiness Workshop	Managers	• Manager role and tools	Virtual or face-to-face	Enablement Team
6	Logistics	Enrollment Instructions	Frontline	• How to register	Email	Enablement Team
7	Logistics	Pre-work Email	Frontline	• Pre-work instructions	Email	Enablement Team
8	Logistics	Managers' Reminder	Managers	• Remind managers to hold pre-meeting	Email	Enablement Team
9	Commitment	Manager/Learner Pre-Training Meeting	Frontline	• Why course is being held • Benefits to learners • Manager's expectations • Support for learners	Face-to-face	Managers
10	Kickoff/ Commitment	Senior Business Unit Leader kicks off virtual or in-person classroom learning activities	All Learners	• Why you are excited about the learning activities • Potential opportunities the training offers to participants • Your confidence in the learning content and facilitator • How the training will make work more effective (or enjoyable or rewarding). Include personal story.	Face-to-face or via virtual classroom	Senior Business Unit Leaders

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Tool #4:
Managers' Preview: The Key to Success

The key to any successful training program is ensuring the learner's manager is aware of and supports the learning initiative. Managers are the first to see the desired change, give feedback and, to reinforce the new behaviour.

We recommend, prior to the training events, holding workshops or previews to introduce Managers to key learning concepts, desired outcomes, and to understand their role in supporting their employees. Use the framework below to organize and develop your workshop/previews.

PURPOSE

The purpose of the Manager's Preview is to create an action plan at the leader level that:

- **BEFORE** the training events, ensures that the leader understands how learning activities will support organizational and individual goals & objectives, and that the leaders will be engaged and equipped to support the learning and development.
- **DURING** the training events, provides the leaders with a tangible understanding of their role and responsibility in the success of the learning experiences and how to maintain and optimize the learning experience, including reinforcement and coaching.
- **AFTER** the training events, prepares the leader to empower learners to create and leverage peer networks.
- Provides leaders with appropriate language and plans to communicate about the training.

AGENDA

The agenda may vary slightly from case to case, but in general, we recommend that you:

- Discuss how the learning solution aligns with the organization's business objectives.
- Discuss the importance of the managers' role throughout the initiative.
- Provide an overview of all the learning experiences their people will be attending.
- Explain the manager's impact in all phases (BEFORE, DURING, AFTER).
- Review tools developed for managers (e.g., pre-training discussion guides, coaching observer sheets, application kits, etc.).
- Involve the managers in commitment and action planning.

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DURING

This phase provides your leaders with a tangible understanding of their role and responsibility in the success of the learning experiences and how to maintain and optimize the learning experience, including reinforcement and coaching.

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Tool #5:
SMART Action Plan

Participant Name: ______________________ **Participant's Manager:** ______________________

Course/Program Title: ______________________ **Date:** ______________

Commit to applying what you've learned. Decide how and when you will put your new skills into practice and what impact you expect to see. Write down 1-4 of your goals and share them with your leader.

Tip for success! Put reminders in your calendar to review your progress. Have an honest conversation with yourself and your leader at each check-in so you stay on track.

When	Actions	Expected Impact
The first 4 hours back on the job		
Within the next 4 days		
By the end of 4 weeks		
In 4 months		

DURING

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Tool #6:
Skills Adoption Checklist for Managers

Providing Managers with checklists and worksheets are easy ways to increase the likelihood of them helping learners prepare and reinforce learning.

We recommend a checklist like the ones below to help your managers facilitate their discussions with the learners.

DURING

BEFORE

Meet with your employee to connect the learning to business outcomes.

- ☐ Set positive expectations.
- ☐ Preview the learning content and benefits to the learner.
- ☐ Ask the learner to identify any obstacles that might interfere with learning.
- ☐ Remove the obstacles (e.g., schedule uninterrupted time at work to complete the program).
- ☐ Together, identify three to five desired outcomes from the learner's participation in the program.
- ☐ Encourage the learner's active involvement in the learning process by bringing real-world issues/challenges to class to work on.

DURING

Enable the employee to focus on learning.

- ☐ Refrain from interrupting the learner during the learning experiences.
- ☐ Provide support (e.g., provide coverage and minimize disruptions) so that your staff members can be fully present at the training.
- ☐ Talk about your learner's experience; ask the learner to share the action ideas or plans they developed in class. (Refer to the ***Tool #5 to learn more***.)
- ☐ Together, create a concrete plan describing how the learner will implement the new knowledge or skill in the workplace. Plan for the learner to complete the goal within 60 days following the training program. (Consider using the ***Tool #5 SMART Action Plan.***)
- ☐ Create opportunities for the learner to perform the skills in the workplace.
- ☐ Observe performance in the workplace and provide feedback, especially in the first 60 days following the training.

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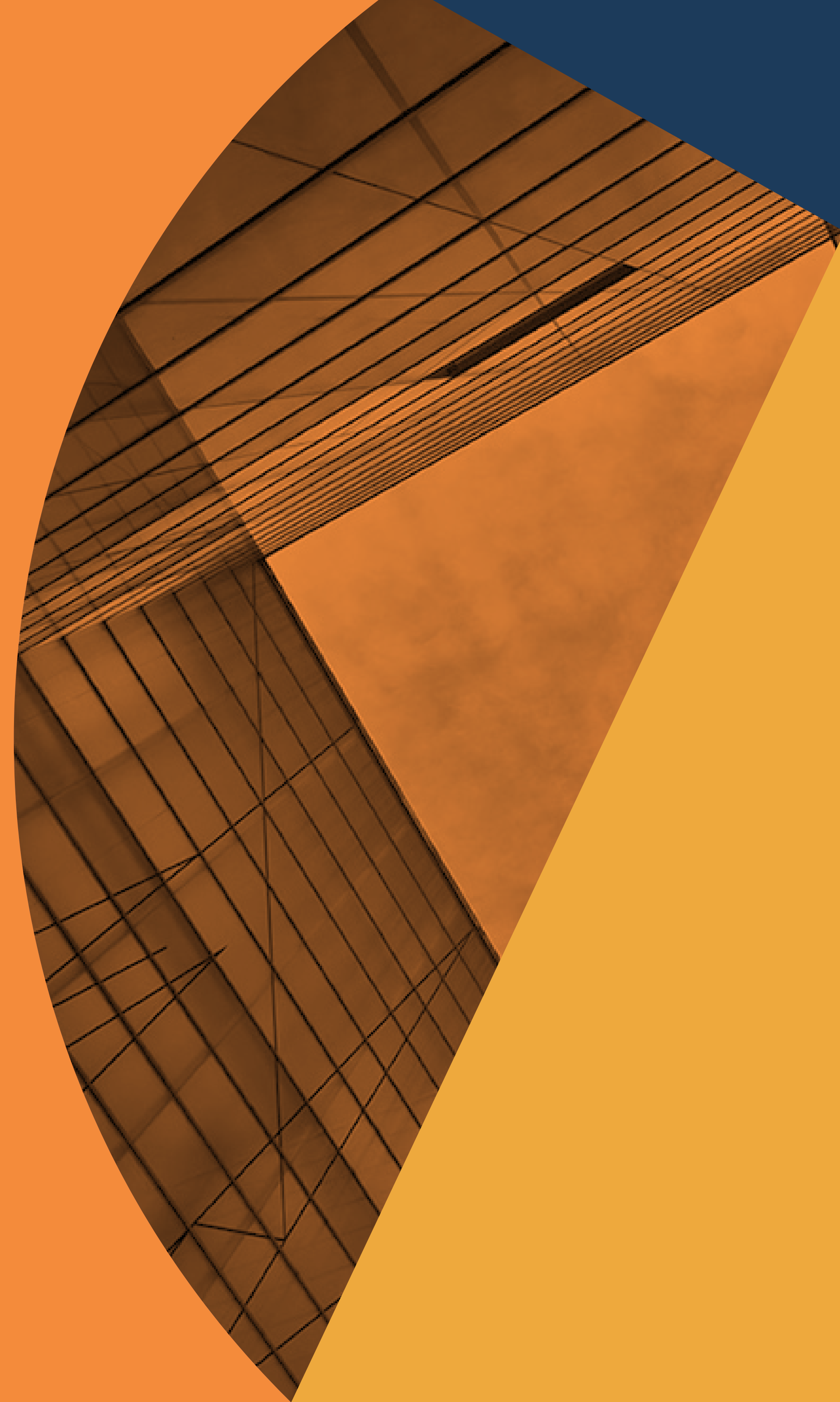
AFTER

This phase prepares your leaders to empower learners to use their new skills and provide the tools and feedback to build confidence back on the job.



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Tool #7:

How to Debrief with Learners: A Roadmap for Managers

Post learning support is a crucial phase for learner success. A debrief discussion is a simple way to help learners share and reflect on their experience. It facilitates recall and insight, clarifies learning points, builds trust and self-confidence, and promotes a positive change in behaviour.

We recommend the following roadmap to guide managers in their debrief discussion with their learners.

AFTER

1 **Meet with each learner a day or two after the conclusion of the training event.**

2 **Ask open-ended questions to generate initial reactions.**

- How did the training go?
- What did you find particularly helpful? Not helpful?

3 **Ask questions to help participants focus on applying the skills.**

- What are some of the key ideas or techniques you learned?
- Have you tried any new skills in the workplace? How did it go? Why were you successful/unsuccessful? What will you do differently next time?
- What skills do you think will be the most difficult? What can you do to become comfortable using them?

4 **Share and solicit personal stories in which you or the participant(s) used these skills successfully—or unsuccessfully.**

5 **Jointly review any action plans (such as the SMART Action Plan) that the employee created as part of training.**

6 **Reiterate your continuing commitment and specify the support you can provide. Ask the participant(s) to specify the kind of support that will be most useful.**

7 **Conclude by setting up a series of regular coaching meetings.**

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Tool #8:
Post-Training Coaching Guide for Managers

Instructions for Managers

In addition to your post-training debrief, it is important to have regular coaching conversations that focus on helping your employees apply what they learned. Here are some questions to use in your coaching conversations.

Describe one or two insights you gained from this class.	
How will these insights change the way you approach [insert skill] in the future?	
What opportunities have you had to use [insert skill] in your work environment?	
What have been the outcomes or results of those [insert skill] opportunities?	
Which key actions have been the easiest to use? The most challenging to use?	
People often put off [insert skill], and sometimes avoid it altogether. How can the key actions help you move past situations that may be personally challenging and "keep the door open" to [insert skill]?	
How has using [insert skill] improved your abilities as a leader?	
What key actions would you like to improve upon?	
What challenge or opportunities do you see in those areas?	
What actions will you take to improve your effectiveness?	
How can I provide support to you in developing those areas in which you would like to increase your performance level?	
How will using the key actions for [insert skill] improve the way we interact with each other? Improve our business?	

AFTER

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Tool #9:
Setting Up a Peer Practice/Coaching Program

Peer Practice/Coaching Programs can help participants improve their skills during the DURING and AFTER Phases. Typically, participants observe one another or collaborate on methodology usage and then provide feedback on areas for improvement.

AFTER

Use this When:	• When participants would benefit from taking more responsibility for their own evaluation and improvement • When you want to underscore the need for teamwork and continuous improvement • When you want to reinforce the learning during and immediately after the training
Duration	• 15 minutes to explain the tool to your group • 10 minutes to set up peer partners
Consider Using When:	1. At a group meeting, explain that the concept of peer practice/coaching is to form pairs and observe each other and/or review methodology usage on an ongoing basis and offer feedback concerning their application of the new skills and methodology. 2. Ask participants to group themselves into pairs. 3. Present the guidelines for peer practice: • Both participants identify a skill or methodology they need or would like to work on. • Each reviews the skill/methodology in his or her learning materials. 4. The pair sets up times when each partner can observe the other performing the skill or collaborate with them regarding methodology usage. During these times, the peer partner focuses only on their partner's use of the identified skill or methodology. 5. After observing or collaborating, the peer coach gives feedback, first specifying what their partner did well, then mentioning what they might do differently the next time. 6. Periodically check in on practice pairs' progress.

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Tool #10:
Ideas for Celebrating Success

Once the training has been completed, it is important to broadcast and celebrate the successes of the training so momentum is maintained and learners stay motivated.

Suggestions:

- Organize a post training celebration/graduation, and present participants with a physical token that signifies their participation in the training.
- Frame certificates of completion to add symbolic value to the training experience—makes it more likely that participants will take pride in their achievement.
- Involve leaders in congratulating participants personally (i.e., individual e-mails or written notes).
- Develop post-training communications that include participant quotes and feedback from SMART Action Plan Sheets that are posted on internal websites, newsletters, common areas, or distributed via e-mail.
- Seek out people applying the skills and publicly reward them.
- Institute a “caught in the act” peer recognition program where employees can recognize and celebrate peers who use new skills and behaviours.
- Create a space on the bulletin board for success stories. Mark off the space with a big, bold headline. Post positive letters or comments from customers or other departments praising your group (or a group member) for using new skills to solve a problem, handle a difficult situation, or provide exceptional service—or create your own compliment to post.
- Practice an attitude of gratitude by noticing what’s going well and by offering some encouraging words to those responsible.

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