

Strategies & Solutions

Training Strategy Using Internal Experts

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Organizations are maximizing their resources to develop and implement training strategy by collaborating with internal experts.

Training

Supply management organizations are in the midst of immense changes. As the function evolves from tactical to strategic, sourcing professionals require new and increasingly sophisticated competencies. Today, supply managers must be skilled not only in supply management but in the management of the entire value chain, as supply management organizations become significant players in organizations' quests to gain competitive advantage.

Why a Training and Development Strategy for Supply Management Organizations?

Organizations that are on the ball will craft sound training and development (T&D) strategies to ensure that the supply managers who hold these increasingly critical jobs have the know-how to excel. Of course, it isn't easy to implement T&D strategies successfully in today's time- and money-starved organizations. Overburdened employees complain that they can't find time to attend formal training sessions, especially when held offsite. In addition, those who do attend training often find that only part of what they learn is relevant to their jobs.

What is the solution? One answer is to develop a training strategy that features innovative, time-saving delivery methods *and* is matched to the specific needs and circumstances of the organization. The backbone of the system should be the finest employees working in the organization. These internal experts are in the best position to identify which knowledge and skills are most essential for sourcing professionals in their organization. Likewise, those people who have proven themselves in the trenches are in an ideal position to impart organization-specific processes and practices to novices.

Unfortunately, since sourcing processes are evolving rapidly, few employees may possess all of the necessary abilities. Individuals may have expertise in certain aspects of the job but not in others. Moreover, some newer competencies may be absent altogether from the organization. In this case, outside experts must also be involved in the development of the strategy. Nevertheless, it is imperative that the best and most experienced insiders work side-by-side with the outside experts. The challenge for the designers of the strategy is to identify who excels at what and then enlist these exemplary performers in the training and development cause.

How Can Internal Experts Help?

A major goal of any T&D strategy today should be to maximize learning while minimizing job downtime. The following ideas represent just a few ways that organizations can draw on their internal talent to design and implement such a strategy.

Assemble a training and development strategy group. One of the best ways to use internal expertise is to organize a group to oversee the development and implementation of the training strategy. This group must be composed of members who have credibility and clout and, thus, are in a position to make or strongly influence decisions. In addition, the group members should be those within the supply management organization who have demonstrated the greatest interest and, ideally, the strongest capabilities in carrying out the more strategic sourcing roles. The T&D world refers to these people as subject matter experts (SMEs). They bring profession-related expertise to the table. T&D professionals should facilitate the group. Lacking a training background, SMEs may flounder when attempting to find innovative methods for accomplishing their goals. When T&D experts come together with SMEs, however, the group is most likely to succeed in producing a strategy that is fresh and effective.

One example of a partnership between supply management experts and T&D professionals occurred in the global sourcing department of a pharmaceutical organization. The goal was to identify best sourcing practices within the organization, pinpoint what made them effective, and then implement them throughout the organization. The SMEs involved in this project were all exemplary employees who were committed to strategic sourcing. They were able to identify and explain the best practices, although they required some assistance from the consultants in reaching consensus about which practices should be incorporated into standard work processes. Once they reached this consensus, the next challenge was to agree on how to train others in the new processes. The organization had traditionally relied on extended classroom presentations for training. But with the goal of maximizing learning while saving time, the T&D professionals worked with the SMEs to design an alternative approach. Ultimately, they developed a two-day program in which SME leaders helped trainees try out the new work processes using organization-specific supply management cases. The SMEs helped participants learn how to carry out each step, including what data to gather, how to analyze it, and how to generate options pertaining to it.

Use subject matter experts to determine curriculum content. The organization's internal experts have knowledge, skills, and abilities (KSAs) that they use to carry out their duties and make decisions. An excellent way to develop the content for training that meets real organizational needs is to base it on the KSAs possessed by the organization's finest talent. These KSAs may be of two types. The first type is fact-based and procedural. Training professionals use fairly straightforward procedures called *job analysis* and *task analysis* to access this information from SMEs. Job analysis involves identifying what tasks jobholders currently do or should do. Task analysis entails outlining the steps they should take to carry out the tasks. In addition, both job analysis and task analysis examine which KSAs jobholders must have to complete the tasks effectively. The analysts gather job and task data by researching existing documents such as job descriptions and procedures, distributing questionnaires, and/or conducting interviews with SMEs.

For an illustration of job/task analysis, recall the example of the pharmaceutical organization planning a training strategy to teach new sourcing procedures. The T&D professionals conducted both analyses in collaboration with the managers and the "best-practice" SMEs. They established a list of critical tasks by reviewing pertinent existing documents and interviewing the managers of the sourcing organization. Once they finalized the critical task list, the analysts met with the SMEs to document the basic steps involved in carrying out each of the critical tasks. In addition, they ascertained which skills and abilities were significant to performing the steps effectively. They discovered, for example, that the effective sourcing professional within this organization must be competent with various organization-specific electronic databases, and must be adept at knowing where to collect and how to analyze data on issues affecting the specific industries supplying the organization.

The second type of KSA is called tacit knowledge — a combination of information, experience, and intuition that expert jobholders use, often unconsciously, when performing tasks and making decisions. Tacit knowledge differentiates really effective performers from their peers. Organizations that can access this knowledge from their best employees and pass it on to other staff have a tremendous advantage over competitors that stick to teaching procedures and easily transferable competencies. Because it is used unconsciously and automatically, however, tacit knowledge is difficult to identify. One technique used by T&D professionals is called *analysis of expertise*. This typically involves interviewing jobholders about nonroutine incidents that occur on the job — those that require considerable experience to handle well. The goal in the interview is to analyze how experts make decisions in such situations in order to uncover the criteria, strategies, and information that they use.

Refer again to the pharmaceutical organization example to illustrate this point. After identifying the most basic steps, the T&D facilitators asked the SMEs to describe concrete situations that exemplified how they carried out each step. As the SMEs relayed their stories, the facilitators probed by asking questions, such as how they chose between several alternatives, how they weighed options, or what information they examined in order to make decisions. From these data, the facilitators worked with the SMEs to identify the tacit principles used as well as the KSAs that were most critical to the job. This information became the foundation of the training program.

For example, through an analysis of expertise, an SME described how she made the decision to visit a supplier site before she completed the request for proposal (RFP). She mentioned that these visits could be costly and time-consuming. Thus, site visits should occur only when a desirable payback will result. Since supplier visits take place more often after the RFP process has narrowed the field, the analyst asked the SME questions to get at why she had chosen to make a site visit before the RFP was sent. While attempting to draft the RFP, the SME realized that she didn't know enough about the supply base to ask truly pertinent questions. She chose the site visit because less expensive alternatives to data collection, such as Web research, had failed to give her the detail that she needed to isolate the factors that would differentiate viable suppliers from the rest of the pack for this particular organization need. The analysis went on to probe how the SME determined which supplier sites to visit and how she determined what to look for and what to ask in her interviews while onsite. Finally, the analyst worked with the SME to derive principles to guide decisions about when to make site visits, how to choose the

sites, and how to organize the data collection process. These principles, accompanied with the SME's examples, were integrated into the content for the work process training.

Use internal SMEs to deliver the training and development experiences. Still another way to use internal experts is to involve them in the delivery of the training or learning experience. With the proper materials and some preparation, most SMEs can become effective teachers. As in the pharmaceutical example, SMEs can turn traditional classroom training into an exciting opportunity for new employees to learn and practice their skills with the organization's best talent. But SMEs can also be terrific resources for more nontraditional learning experiences. For instance, they can lead structured on-the-job training (SOJT), in which trainees learn to apply new knowledge and skills in the actual job setting, with guidance and feedback from experienced jobholders. Or they can participate in structured mentoring programs, in which experts provide more informal practical and emotional support to novices.

One caveat: do not assume that individuals who have great knowledge of a subject can automatically teach it effectively. The T&D professionals can offer valuable instruction on how to facilitate learning experiences, both formal and informal. Some of the services they can provide include conducting "train-the-trainer" sessions for SMEs or designing mentoring or SOJT toolkits that the SMEs can use as guides.

Changes occurring within supply management organizations necessitate increased attention to the training and development needs of sourcing professionals. One way to meet these new needs effectively and efficiently is to involve employees who are most familiar with and committed to the new ways of doing business. The article has described a few of the many ways to involve internal experts in the design, development, and delivery of T&D strategies. Regardless of the exact role they play, when sourcing experts collaborate with T&D professionals, together they can create learning programs that successfully support the goals of the organization while saving time and money.

EXAM ALERT

MODULE 4

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