

# How do you plan and deliver the development that your people and your business needs?



# Contents

<b>3</b>	<b>Introduction</b>
<b>4</b>	<b>The value of planning</b>
<b>5</b>	<b>Where to start</b>
<b>5</b>	<b>Resources and constraints</b>
<b>9</b>	<b>Company policy</b>
<b>11</b>	<b>Planning the delivery</b>
<b>11</b>	<b>Setting objectives for learning and development</b>
<b>13</b>	<b>Selecting the best delivery option</b>
<b>15</b>	<b>How people learn</b>
<b>16</b>	<b>Being clear about the costs</b>
<b>16</b>	<b>Writing your development plan</b>
<b>17</b>	<b>Making your plan work:</b>
	<b>17 Briefing and preparing your people</b>
	<b>18 Sourcing the right provision</b>
<b>20</b>	<b>Working with your people to plan their development</b>
<b>21</b>	<b>Monitoring your plan</b>
<b>22</b>	<b>Summary</b>
<b>24</b>	<b>Glossary</b>
<b>26</b>	<b>Appendix</b>

To help you use this workbook for the benefit of your business we have provided exemplar proformas for you to adapt and use. You will find these throughout this workbook and in the appendix.

You will also find a glossary to help you with any terms which may be unclear or unfamiliar to you.

# Introduction

This workbook, the second in a five part series, will help you think about how you meet your business's and your people's needs.

It will help you recognise:

- your current approaches and practices
- the variety of approaches you could choose to adopt
- the resource implications of these choices
- how you ensure that your objectives are met
- your review practices.

This workbook is a tool for you to use, read, write in, copy and adapt parts to meet your business needs. You may wish to discuss aspects with external advisers from learndirect scotland for business, the learning centre network, your Local Enterprise Company or Trade/Training Association.

Learning and development should be a planned and managed aspect of the day-to-day business life of any successful SME. The outcomes should be a truly happy, high performance, sustainable business – one that is not constantly reacting to situations or failing to realise the full benefit of the time and money spent on its people's development.

# The value of planning

It has often been said that people are an organisation's greatest asset but, undeveloped, they can also be its greatest weakness.

As we start this workbook we assume that you are already very clear about the training/development needs of your people and your business. If this is not the case you can be drawn into a reactive approach where problems and personalities, rather than business needs, direct your developmental activities.

We would refer you to Workbook One "How do you decide what development you and your people need?" if you feel hesitant at this stage.

No matter how large or small your business, time spent on development activities must meet your business needs. Your approach must be thought through and planned in the same way as any other aspect of your business.

All too often people talk about training, not development, and courses, not learning. 90% of all learning in the UK takes place in the workplace. If it is planned and managed it can be highly effective. Unplanned it can be incomplete and fraught.

The 10% off-site development, properly planned and managed, should bring new skills, new knowledge and new competitive advantage to the business.

Planning learning and development avoids costly mistakes, legitimises learning and makes sure that your people are getting the support they need at a time, place and pace that is appropriate for them and that benefits the business.

## Checklist

	Yes	No
Have you ever had to cancel someone's attendance at a formal course because the person could not be released?	<input type="checkbox"/>	<input type="checkbox"/>
When you talk about learning and development do you really mean attendance at a course?	<input type="checkbox"/>	<input type="checkbox"/>
Do you see learning and development as separate from other key business activities?	<input type="checkbox"/>	<input type="checkbox"/>
Have you felt that you have wasted money on expensive courses that have had little impact on your business?	<input type="checkbox"/>	<input type="checkbox"/>
Have you taken workplace learning for granted and just assumed that it happens?	<input type="checkbox"/>	<input type="checkbox"/>
Have you developed key workers to be coaches and instructors?	<input type="checkbox"/>	<input type="checkbox"/>
Do you act as a mentor for new colleagues and those newly promoted to management posts?	<input type="checkbox"/>	<input type="checkbox"/>

If you have answered 'Yes' to some of these questions, continuing to work through this workbook could help you improve the way you plan, implement and measure the impact of your development activities.

## Where to start

The first step is to realise that all your people, including you, will have development needs.

These will vary from acquiring new skills and knowledge to causing attitudinal shifts and, most importantly, sustaining current good practice.

Learning and development may once have meant responding to wish lists and glossy brochures. This workbook will try to help you take forward the prioritised list, developed as you worked through Workbook One, and turn it into a costed plan with explicit objectives; a different approach to development planning.

If you have not used Workbook One, we would ask you to pause and data sift so that you can identify a clear list of developmental priorities for your people and your business. This is the essential starting point to the planning process.

## Resources and constraints

You have checked thoroughly and are now satisfied with the currency and relevance of the list of activities you need to instigate to meet the learning and development needs of your people and your business.

The next step is critical. You now need to sort out how to do it, the costs, and how to access support, if any is available to you.

## Checklist

Do you know?	Yes	No
How much money and time you can afford to allocate to learning and development activities each year?	<input type="checkbox"/>	<input type="checkbox"/>
What financial support you can source locally or from national bodies?	<input type="checkbox"/>	<input type="checkbox"/>
What training is organised locally by your Trade Association, suppliers or local providers?	<input type="checkbox"/>	<input type="checkbox"/>
What training has and has not been effective in the past and why?	<input type="checkbox"/>	<input type="checkbox"/>
What appropriate vocational qualifications are available?	<input type="checkbox"/>	<input type="checkbox"/>
What special funded schemes are available through JobCentre Plus?	<input type="checkbox"/>	<input type="checkbox"/>
What quality initiatives are available to help you focus your efforts?	<input type="checkbox"/>	<input type="checkbox"/>

You need to be able to answer these questions if you are to control and manage this aspect of your business.

Any plan needs to be resourced. Resource allocations always have implications, and these need to be identified and thought through.

Your plan can be supported in a number of ways:

- totally resourced internally, both financially and with personnel
- jointly resourced financially with external funding partners in certain key skill areas
- jointly resourced in delivery with external training providers and internal personnel.

Whatever your decision, you are making a business decision with risks, costs and benefits. Your decision should be driven by your needs, your circumstances and your expectations. It should lead to demonstrable, planned outcomes that will help you realise the key objectives of your Business Plan.

## Case Study

A local construction company has been going through an expansionist period. As a result its use of IT has grown and it has found itself with three different systems – all stand alone. Not only that, but some of its people were still relying on notebooks and pens, whilst others were increasingly frustrated by their lack of access to an integrated system.

The company recently decided to invest in a new system, but was concerned about the cost of training all its potential users. It recognised, however, that it must do this if it was to maximise the investment it had made.

Talking to learndirect scotland for business they realised two things:

- online and CD Rom based training material were available to help their people **at work**
- in-house champions – encouraged to run 1/2 hour clinics each week were a proven recipe for success.

Once the company had talked this approach through with their people they were delighted to find a natural order emerging: Update those already 'e' skilled and then develop them as coaches and champions to run the in-house programme, in waves, for all their people. Even the notebook guys could see how using laptops would make life easier for them and the company.

Suddenly, instead of an on-cost of three times the system (not unusual these days), a managed programme that would deliver real and sustainable business results moved into place.

## Activity

Note below your responses to the following resource questions.

<b>Budget:</b>	<ul style="list-style-type: none"><li>■ When is the budget negotiated?</li><li>■ How frequently is it reviewed?</li><li>■ What % of gross budget is your minimum allocation for bought-in development?</li><li>■ What figure do you allocate to in-house development?</li></ul>
<b>Funding and support options:</b>	<ul style="list-style-type: none"><li>■ Who is subsidising skills training?</li><li>■ When and how do you bid?</li><li>■ Who is offering local skills and mandatory training?</li><li>■ What levies and subsidies are available?</li><li>■ What government funding is available?</li></ul>

## Activity *continued*

<b>Qualifications:</b>	<ul style="list-style-type: none"><li>■ What qualifications do your people need and why?</li><li>■ Who delivers them locally?</li><li>■ What other delivery routes are available?</li></ul>
<b>External provision:</b>	<ul style="list-style-type: none"><li>■ Who is providing what locally?</li><li>■ What do learndirect scotland learning centres offer?</li><li>■ How can you collaborate with your customers and suppliers to jointly meet your needs?</li></ul>
<b>Internal provision:</b>	<ul style="list-style-type: none"><li>■ Have you identified and developed internal coaches and instructors?</li><li>■ Have you prioritised and legitimised workplace learning?</li><li>■ Has the management team been developed to take on a mentoring role?</li><li>■ Are project work and placements used to develop your people?</li></ul>
<b>Other sources:</b>	<ul style="list-style-type: none"><li>■ Have you identified exemplar organisations to visit?</li><li>■ How do you use the information from trade and professional journals in-house?</li><li>■ How do you harness mistakes and near misses and turn them into learning opportunities?</li></ul>

# Company policy

More and more these days, young people expect their workplace to be partners in their development. They expect to join a company with a clearly defined learning and development policy. Do you have one?

The following checklist will help you reflect on your current practice and identify anything you might wish to formalise and/or improve.

## Checklist

	Yes	No
Is it clear to all your people what you will and will not pay for in terms of their development and why?	<input type="checkbox"/>	<input type="checkbox"/>
Is it clear to all your people on what you will or will not allow time to be spent for their development and why?	<input type="checkbox"/>	<input type="checkbox"/>
Is it clear what clawback clauses you would expect to impose if a person leaves you soon after completing their training?	<input type="checkbox"/>	<input type="checkbox"/>
Do people know who to talk to about their learning and development and when?	<input type="checkbox"/>	<input type="checkbox"/>
Is it clear what role people play in planning their own learning and development and when?	<input type="checkbox"/>	<input type="checkbox"/>
Is it clear how objectives are set and agreed for all development activities and how the subsequent impact is to be reviewed?	<input type="checkbox"/>	<input type="checkbox"/>

## Case study

A small engineering services company had made a significant investment in training its field engineers and other employees. Success in their marketplace demanded people of the highest calibre with recognised qualifications and knowledge of leading edge technologies. They found it helpful to create a simple set of statements which outlined their policy.

### Training policy – FSE Ltd

#### Professional status

- All engineers are required to hold a recognised qualification. This may be a Level IV Vocational Qualification, a Higher National Diploma or a Degree.
- The company will pay for all essential, job-related training and development as agreed between the engineer and his line manager responsible for the authorisation and arrangement of appropriate training activities.
- The company will support attendance at one major conference and two local seminars every year for each engineer.

#### Identifying training and development

- Discussion is encouraged throughout the year, but there will be a formal annual appraisal and quarterly reviews for all employees. Development needs will be agreed at these meetings.

#### Further education

- All employees are encouraged to develop their skills and their potential through participation in relevant further education. Where suitable evening courses are identified, the company will pay half of any costs of attendance. In the event of the employee leaving the company within one year of completing such funded courses, they will be required to refund the costs in full.

## Activity

If you decide that a written policy would be of benefit take time now to list the headings you would want to cover. Once drafted this must have acceptance by everyone in management/supervisory roles and be used as a key document in your staff handbook to inform your people processes.

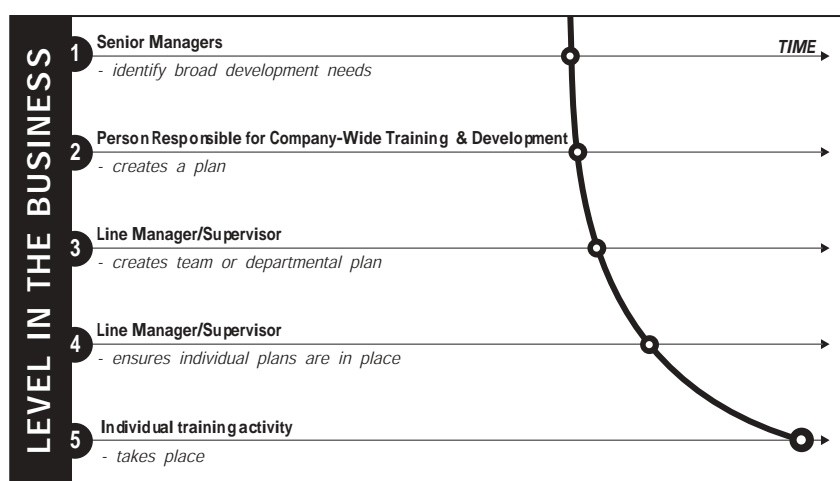
By this stage you should have:

- your prioritised list of needs
- details of the resource options and implications of meeting these needs in a variety of ways
- a draft company learning and development policy.

## Planning the delivery

Ensuring that development needs are actually met requires commitment, planning and action. Irrespective of the size of your business, the five level model shown below is applicable.

Top management, whether an owner manager or Chief Executive needs to be able to identify and articulate the broad development needs for the business. A plan has to be developed to accommodate company-wide, team specific and individual development needs. This needs to be resourced, communicated and understood by all involved.



Timing is critical. Some needs are business critical and have a short lead time. All need to be scheduled so that they can be met in a way and at a time that does not disadvantage the business or the participant.

## Setting objectives for learning and development

No development should be actioned without clear and explicit objectives being agreed beforehand.

These objectives should set out the outcomes of the learning and development activity. Objectives need to be **SMART**:

- specific
- measurable
- achievable and agreed
- realistic
- time bound and testing.

They create the framework against which to evaluate the effectiveness of the activity.

They also create a clear focus and set of expectations for line management, the participant and the tutor.

Objectives need clear, unambiguous language. Words to avoid include: good, appreciate, recognise. Words to use include: demonstrate, explain, reduce, increase.

## Case study

When Jimmy successfully led the management buyout of the small jewellery business he used to work for he suddenly felt vulnerable. He had secured the monies, he had secured the commitment of the workforce, but his confidence in his management ability was zero. He decided that he needed some sort of management development.

Fortunately he had the benefit of a mentoring/networking relationship with a former colleague who'd since gone on to work for a big multi-national. Together they recognised that what Jimmy really needed was exposure to other managers and the creation of his own learning network.

He specifically wanted to be able to:

- set up and sustain effective communication with colleagues and clients
- introduce effective business review practices
- demonstrate performance results to his people
- encourage and develop a culture of continuous improvement.

Now that he had got **specific** objectives he was able to liaise with the local enterprise company and its business club. As a result, he instigated a series of visits to businesses with existing good practices that were prepared to open their doors to him and share those practices.

Jimmy was relieved and delighted, and he and his business have never looked back.

## Activity

Return to your prioritised list of needs and apply **SMART** objectives to them all. Whilst this may initially seem onerous it is the only way to ensure that you are effective as you plan to allocate the precious resources of people, time and money to these activities. This is the only way to ensure that you realise the benefit of your investment – otherwise how do you know?

**Example:** Be able to set up and sustain effective communication with colleagues and clients (**SAR**). This will be evaluated on a six monthly basis through staff surveys and client feedback (**MT**).

# Selecting the best delivery option

Until you are clear about what you are trying to achieve you cannot decide how best to set up the delivery model.

Let us remind you – **90% of learning takes place on the job**. Well done it can be highly effective. It is relevant, specific and achievable straight away. However, if unmanaged, it can be inconsistent, ad hoc and damaging.

There is a whole raft of options both in the workplace and away from it as the following listing shows.

## In the Workplace

- **Sitting by Nellie:** we are all familiar with this and it can work well. You should arrange for the trainee to work with an employee who is known to be good at their job and willing to share their knowledge, skills and experience.
- **On-job instruction:** the trainee receives formal instruction by an employee or supervisor trained in instructional techniques. This may be in a special training area.
- **Training manual:** written instructions are given which detail the procedures required to complete a job.
- **Coaching:** during everyday work, you take the opportunity to plan, delegate and discuss work activities.
- **Counselling:** through questioning, listening and discussions you help the trainee to work out their own solutions to work performance problems or development opportunities.
- **Special projects:** identify projects or assignments which the individual or team can complete. This is particularly useful when developing people for new roles and responsibilities.
- **Job rotation:** move people into new jobs and departments to broaden their skills and knowledge of other parts of the business.
- **Mentoring:** advice and guidance offered by a more experienced person to help develop individuals' potential. It tends to focus on long term development.

## Away from the workplace

- **Briefing sessions:** share information and examples with groups and then encourage question and answer sessions.
- **Courses, seminars and workshops:** organised events, held internally or externally.
- **Online learning:** via the internet, using discs, interactive video or multimedia either custom designed for you or bought off-the-shelf from suppliers.
- **Distance learning:** workbooks, videos, audio tapes, etc can allow trainees to work at their own pace at times and locations most suited to them.
- **Books, journals and publications:** an often ignored approach to training, this can be just as effective as a course if the topic is suitable and the trainee likes to learn in this way.
- **Attendance at conferences and exhibitions:** organised events, held externally.
- **Demonstrations by suppliers:** new products and materials.
- **Joint training with suppliers:** to understand their systems, procedures and quality assurance requirements.
- **Legislative updates:** by government bodies.
- **Accessing the internet:** relevant material and specific courses of interactive study.

## Activity

Write here the approaches you already use, and note what works best in your business. If there are methods mentioned above that you have not used before, but think would be right for your business, budget and people, add them to your list.

<b>Learning and Development Approach</b>	<b>Effectiveness on a Scale of 1-4 (1-excellent, 4-poor)</b>
	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>



# How people learn

People learn in different ways. It has been recognised that there are four common learning styles:

**The Activists:** like to have a go, or try things out. They are usually open minded and flexible and want to get 'stuck in'. They enjoy training that is fun and which challenges them. They do not take kindly to being talked at.

**The Pragmatists:** are planners and are usually practical and down to earth. They like to test things out and to see for themselves how things come together. They like to get the background knowledge and theory and then apply it.

**The Theorists:** logical thinkers, they like models and systems which explain processes. They will question situations and will not be easily put off if they are determined to find the answer. They are disciplined and will work things through to a logical conclusion.

**The Reflectors:** cautious and careful, they are thoughtful and unlikely to rush at applying new approaches without them being properly tried and tested. They rarely jump to conclusions and enjoy listening to others.

Think about your own experience of learning, good and bad, recognise how important it is to try to match the style of delivery with the individual's natural learning style.

It is important also to remember that few learning activities stand alone. They are part of a continuum where reinforcement, either positive or negative, will determine how much of the learning is transferred and applied in the work place. Each event is part of a lifetime's learning and should not be viewed as an isolated incident, something to satisfy a ticklist mentality.

## Prompt...

Look again at the list of delivery options you have developed and consider how well they will meet your people's preferred learning styles.

Be prepared to talk to your people to check that you know how they prefer to learn.

## Being clear about the costs

All too often businesses think that the monies they set aside for their people's development equates to that spent on course costs. Forgotten are the costs of:

- people's time
- opportunity costs (lost production)
- travel/subsistence
- coaching/mentoring costs.

These indirect costs are important. They help you to:

- appreciate the true costs of managing this aspect of your business
- price development costs into any bids you prepare
- fully evaluate the Return on Investment (ROI) of your development activities.

## Writing your development plan

### Prompt...

Before you start to formalise your plan always take time to:

- check that you have identified the appropriate activities which will address the different needs you have found
- make sure that SMART objectives have been agreed for all these activities
- make sure that you have thought through how you will evaluate the impact of these activities
- understand what the resource implications are and be sure that you are able to meet them
- think about how you will let everyone know what is to happen and why.

The development plan for your business should be a clear and active plan. Actioning it will enable you to realistically equip your people to help them contribute towards your business objectives and your Business Plan.

The plan should cover the following points:

- an introduction describing the business' objectives
- a description of the way you have identified the business' development needs and your findings
- a description of the development activities you are proposing and the methods to be adopted
- a description of the resources required (time, money, facilities, etc)
- a description of the outcomes and how these will be evaluated
- a schedule of planned activities which will be shared with all your people
- a communication plan for all levels within the business
- a review schedule with all those contributing to your programme
- a review schedule at senior management level to ensure results and evaluate on an ongoing basis.

## Making your plan work

As with every other aspect of your business, your development plan needs to be effectively managed. You have already:

- identified needs
- analysed needs
- prioritised and planned how to meet these needs
- identified resource implications
- committed to a planned schedule of activities
- committed to evaluation and regular review.

To be sure of success two other factors have to be taken into account:

- briefing and preparing your people
- sourcing the right provision to meet their needs.

## Briefing and preparing your people

You have raised expectations. You have involved your people in the process of identifying needs and discussing priorities and learning styles.

They now need to know what is going to happen, when, how and why. This is down to you.

They will expect to be actively involved in the evaluation of the outcomes and the approach to future plans. You need to communicate and keep communicating and remember that this is a two-way process.

## Sourcing the right provision

As we have discussed, 90% of learning takes place in the workplace.

Developing experienced workers to be coaches, instructors and assessors makes good business sense. So also does recognising the things that they cannot do and the support that they will need.

You will be considering:

- accessing external provision for specialist knowledge and updates
- bringing in external provision for company-wide development
- creating trained in-house champions
- acting as a role model yourself.

learndirect scotland for business will be able to guide you about sources of external provision. They are not a training provider, however, they provide a useful and impartial service, helping you to understand what training provision exists across Scotland.

The learndirect scotland for business national business training advice line is a local rate advice line designed to support business learning. Their team of business learning advisers will give advice and support on all areas relating to training and will source suitable learning opportunities for your staff.

learndirect scotland advisers use information that is currently held on the national learning opportunities database, which contains information on over 100,000 training courses and 1,200 training providers. Advisers will discuss your particular needs with you and will provide you with relevant course information based on:

- sector
- locality
- method of delivery
- level of qualification
- length of course
- cost.

Coupled with their own knowledge of the learning landscape, learndirect scotland for business is confident that they will find the right training solutions for your business.

They will advise on all sources of training and assistance available to small businesses such as learning centres, Local Enterprise Companies, business networks, Chambers of Commerce, Sector Skills Councils and Trade Associations.

For further information please visit the learndirect scotland for business website: [www.lids4b.com](http://www.lids4b.com).

## Checklist

Considerations when choosing a training provider:

- timeliness of response
- appropriateness of response
- costs
- availability to deliver
- track record
- relevance of references offered.

Thereafter a face to face or telephone interview should enable you to decide prior to awarding the work, and is likely to explore:

- who will actually deliver the programme and their appropriateness
- the understanding of your business and its needs
- the experience of the topic and the business sector
- the review and evaluation process proposed
- the administrative requirements proposed.

# Working with your people to plan their development

Now you have:

- identified the development needs for your people and the business
- identified the best way to meet these needs
- allocated the appropriate resources
- established a review and reporting mechanism.

It is important to remember that this structured approach is to enable your people to develop the knowledge, skills and behaviours essential for your business and its long term success.

To do this, training and development has to reach the right people, at the right time, and be delivered in the right way. Your people need to fully understand what they are doing and why, and be encouraged to fully implement and embed what they learn in their own and the business' practices.

The following checklist may help you:

## Checklist

	Yes	No
Has the person been briefed about the activity they are about to experience?	<input type="checkbox"/>	<input type="checkbox"/>
Have SMART objectives been set and agreed?	<input type="checkbox"/>	<input type="checkbox"/>
Does the person know what performance outcomes they are expected to achieve after their development and how they will be assessed?	<input type="checkbox"/>	<input type="checkbox"/>
Have they completed any agreed preparation work?	<input type="checkbox"/>	<input type="checkbox"/>
Do they know the arrangements i.e. when, where, how?	<input type="checkbox"/>	<input type="checkbox"/>
At the point when the activity actually takes place, is the line manager involved? (In addition to briefing the trainee, they also need to coach, counsel and debrief after the event to make sure that the training translates to performance on the job and that the appropriateness of the approach is evaluated.)	<input type="checkbox"/>	<input type="checkbox"/>

## Case study

An engineering company, making parts for the electronics industry, found they had to recruit a number of temporary employees on a regular basis to cope with the work flow. Because they were involved with a number of different contracts, each with very specific product and quality specifications, regular training was a necessity. While there was a central co-ordinator, the real responsibility for training lay with the line supervisors. At the start of each new contract, they held a team briefing to explain who the customer was, any special needs or features and key quality issues. After the briefing, all those involved in the contract received training from a qualified instructor who made sure their skills were up to scratch.

During the first week after this training, the supervisor checked samples of every individual's work and gave additional support if it was required. Had the company taken short cuts and failed to provide the training, they would most certainly have had quality problems, rework and potentially lost contracts.

They recognised that if the supervisor's role was to ensure performance, output totals and quality, then that role included supporting and developing their people.

They also made sure that supervisors had the ability to coach, develop and monitor their people.

## Monitoring your plan

The plan is in place, people are briefed and delivery is about to commence. However, as we all know, things do not always go to plan.

It is vital that you:

- monitor your plan
- have contingency arrangements
- are prepared to be flexible
- are seen to be committed to honouring the plan and achieving its outcomes.

Some organisations fail at this stage. They confuse flexibility with looseness and wonder why their people lose patience, lower their expectations and become de-motivated when 'slippage' becomes stagnation.

The acid test is the demonstrable performance benefits accruing from completion of your plan. If the plan slips, the benefits are lost.

If your people see other priorities, reactive priorities, derailing the plan they will tend to believe that training and development is **not** an integrated activity and is **not** really valued. It is rather a 'when we can get round to it' or 'when we *have to* activity'.

It makes sound business sense to build a review of your business development plan into your regular business meetings and particularly into your business planning and review cycle.

This will enable you to adjust, enhance and evaluate the effectiveness of your approach and its impact on the bottom line (ROI).

## Case study

A small instrument supply company had established long term relationships with its customers and suppliers.

Manufacturers and suppliers regularly did product update training for the internal and external sales staff, but nobody had ever thought to include the admin team.

As a result they considered themselves to be paper processors and had little idea of the impact on client satisfaction of mis-coding orders and securing the wrong parts. The company used Investors in People as its external audit and was shocked to find how excluded their admin team felt.

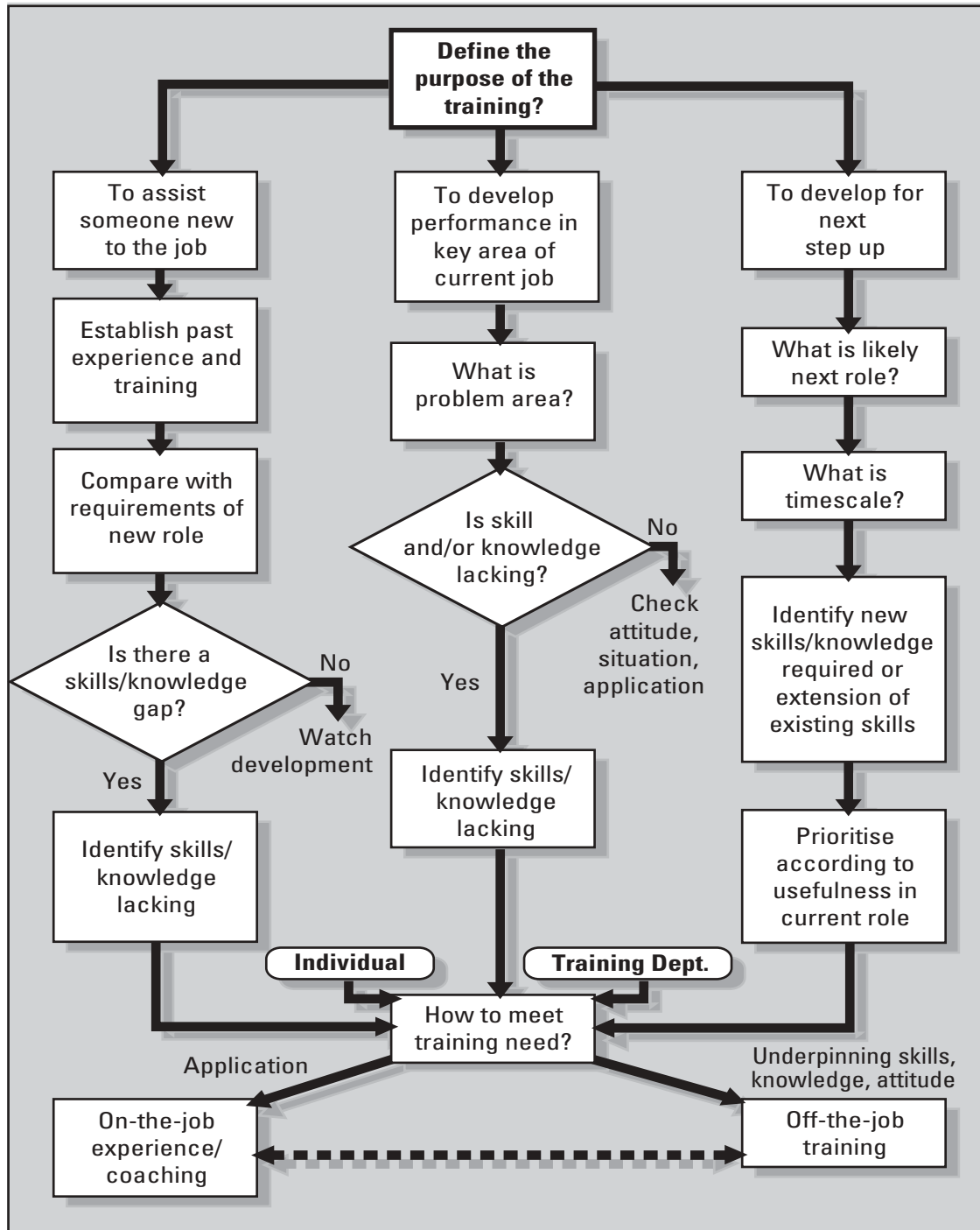
Subsequently they started to display photographs of installations, oil rigs, refineries, pumping stations and have the manufacturers, suppliers and the sales team do mini briefs to help admin understand the components they were ordering and invoicing.

The result has been more joined-up thinking across the company and identification of people with the potential to join the sales and warehousing teams.

## Summary

The schematic overleaf shows the process you have worked through and will act as an aide-memoire for your future use.

We hope that this workbook has helped you review and revise the way in which you plan the development activities for yourself, your people and your business. Workbook Three **“How do you measure the benefits of training and development?”** will help you quantify and develop your approach further.



# Glossary

Words can mean different things to different people. This glossary explains what certain words mean within the context of this series of workbooks.

**Benchmarking:** An approach which enables you to compare your company's strategies and practices with those of your competitors or other similar organisations.

**Business Plan:** The plan that sets out the company's objectives.

**Capability:** The knowledge, skills and behaviours needed amongst the company's people.

**Capacity:** The skills and abilities a company needs to enable it to respond to current and future business needs.

**Coaching:** A planned process that, through the use of effective questioning and feedback, aims to improve the performance, learning and development of an individual or work team.

**Competence:** The knowledge, skills and understanding to enable you to consistently perform the whole work role, in the working environment, to deliver prescribed business results.

**Contribution:** The ideas, time and effort people give to the company to help it achieve its objectives.

**CPD:** Continuing Professional Development.

**Critical incident analysis:** The process of recognising and learning from real life, workplace based, critical incidents to inform the company's practices.

**Evaluation:** The review of the results of learning and development activities to discover whether the objectives have been satisfied and the impact on performance has been achieved.

**IIP:** Investors in People, a national standard of business practice.

**Impact:** The results achieved from an intervention and the effect this has had on performance.

**Innovative:** New or improved ways of thinking and doing things.

**Intervention:** A planned activity with anticipated specific outcomes which benefit the workplace.

**ISO 9001/2000:** A recognised quality assurance system which is externally audited.

**Job description:** A regularly updated document which outlines the key roles and responsibilities of post holders.

**Learning and development:** Any activity that develops the knowledge, skills and behaviours that the company needs to meet its objectives.

**Learning styles:** The way people prefer to learn.

**Mentoring:** Advice and guidance offered by a more experienced person to help develop an individual's potential. Mentoring tends to focus on long term career goals and is *not* usually provided by the direct line manager.

**Near miss analysis:** The process of recognising and learning from real life, workplace based, near misses to inform the company's practices.

**Person specification:** The regularly updated description of the personal qualities, attitudes, behaviours, qualifications and experience required of post holders and team members.

**Personal development:** Any planned activity that develops an individual's knowledge, skills and behaviour. This need not be specific to the current job role or the current employer.

**Profile:** A structured representation of the company's needs for skills, knowledge and behaviour across the various job roles and categories.

**QA:** Quality Assurance system, either internally or externally validated.

**Return on Investment (ROI):** Demonstrable performance improvement as a result of investment in people development.

**Role model:** A person who acts in a way that is valued by the company and creates a positive example for others.

**Sector Skills Councils (SSCs):** Employer-led, independent organisations with responsibility to improve learning supply including apprenticeships, higher education and National Occupational Standards.

**Self review:** An evaluation practice that uses an agreed and structured approach.

**SMART objectives:** The results the company aims for, if it is to achieve its vision. They need to be **s**pecific, **m**easurable, **a**chievable, **r**ealistic, **t**ime bound and testing.

**Succession planning:** An aspect of workforce planning and development. It acknowledges the age profile of the workforce and usual turnover, and develops the potential in people to allow them to be eligible to progress to next level posts.

**The Excellence Model:** A model developed to help businesses in Europe become more competitive and sustainable. It focuses on enablers (how you do things) and results.

**Values:** The principles that underpin how the company works, such as – ‘safety comes first’ or ‘our people matter’.

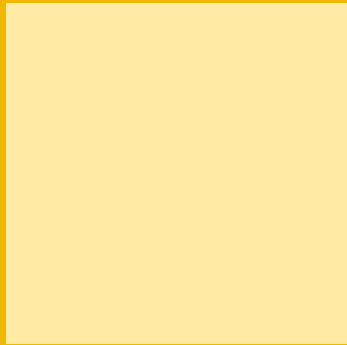
**Virtual or complete cycle:** The process of involving people and teams in the definition of needs and the review of the effectiveness of the ways in which those needs have been met.

**Vision:** Where the company wants to be in the future, and how it wants to be perceived by its people and its customers.

## Schedule of planned activities

Business Aim	Objective	Method	Location	Duration	Costs	Review method	Review date

# Notes



To search our database of over  
100,000 learning opportunities  
please visit our website:

[www.lds4b.com](http://www.lds4b.com)

Impartial advice and support  
is always available via our helpline

08456 000 111