

Strategic Planning for Distance Training

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INTRODUCTION

As pressure increases for training to justify itself as an activity with a return on investment (ROI), it needs to align its activities with the strategic objectives of the organization. More importantly, it must position itself in the minds of the organization's decision makers as a necessary component in the strategic-planning process.

In most instances, training is seen as an on-call resource, basically given marching orders after the strategic direction is set. It might occupy a similar position in the process as the purchasing department—that is to say, none. After the strategic plan is set, orders for training are placed with the training function to be filled and delivered as ordered.

This article looks at the issue of training, specifically distance training and education (DT&E), as a factor in the business unit's strategic-planning process. The training function's historical place in the typical organization will be reviewed briefly, as well as a few of the unique dynamics introduced by the emergence of DT&E. To provide adequate background, a discussion of the strategic-planning process will be presented. Included will be a review of factors contributing to effective strategic planning that moves an organization forward. Additionally, common pitfalls of strategic planning will be discussed. The discussion will then move to training's role in strategic planning or, too often, the lack of training's role. The article concludes with a specific look at how distance training and learning is being addressed in the strategic-planning process.

BACKGROUND

In the past, governments ignored DT&E, and higher education only begrudgingly came kicking and sneering to e-learning. Training is undergoing increased scrutiny for its relevance in terms of the value it represents within the organization. Pepitone (1995) cited four key factors driving the evaluation of training. First, how does training assist the organization in responding to increasing competitive pressures? Second, how does it contribute to

meeting the challenge of remaining profitable and developing a strategic competitive advantage? Third, to what extent is the aforementioned negative image of training accurate, particularly as a dark hole into which resources pour? Fourth, management often has a concern that the practitioners in training lack business acumen and may even hold disrespect for management. Training's value is made even more complex when one looks at distance training and education. DT&E has caused the training function to rethink everything from the fundamentals of instructional design to computing ROI.

The bottom line regarding training is changing completely, and that change is being driven by the growth of DT&E initiatives. The very competencies required of trainers have changed (Berge, de Verneil, Berge, Davis, & Smith, 2002). The up-front costs of DT&E are largely seen to be higher than traditional classroom training, with capital investments higher, and more common, complex, and extensive partnering with vendors and others (Kruse, 2000). This has been a catalyst for many changes, one of which is that training must explain and justify itself in terms of ROI. It is this focus on ROI that will help ease the training function's access to the strategic-planning table. Complicating this partnership, however, is the role strategic planning often plays in an organization. In truth, few organizations do it well.

WHAT IS STRATEGIC PLANNING AND WHY DO IT?

The strategic-planning process generally results in a visionary statement. Unfortunately, the vision is often unclear and fails to communicate the big picture that drives an organization's direction. Typically the process involves the preparation of a massive document, itself often a roll-up of disjointed data supplied by various parts of the organization. Discussions of the industry, competition, market share, cost cutting, and obligatory goals and objectives are the core of the document. Almost without exception, budgets, spreadsheets, and graphs are added to support the narrative (Kim & Mauborgne, 2002).

How Training Fits in the Planning Process

Where does training fit into the strategic-planning process? Does it fit in at all? Specifically, where does the application of DT&E fit in? In the model above, the role of training would be articulated in the environment-assessment stage. Training resources should be seen as those that need to be deployed to accomplish the strategic objectives. The usual approach, however, is for the various areas of an organization to approach the training function after the goals, objectives, and plans are in place. Essentially, departments place their orders for training. This approach often leaves the training function caught short—scrambling for time and resources. This situation almost always results in a function that cannot possibly provide all the services asked of it. Moreover, training must provide its support with the constraints of a budget that has little relationship to need.

Training is Out of the Information Loop

Many organizations persist in treating employees more as an expense requiring control than an asset to be both used and protected (Landes, 2000). It follows that within those organizations, support systems, such as training, are seen as an expense to be controlled.

Although that way of thinking is still common, or even predominant, in the workplace more companies are realizing that shortchanging employee development has a direct impact on the bottom line (Simpson, 2001). Strategic planning's increasing importance is largely a function of a business climate where rapid change is the norm. The changes that companies face are driven by technology, competition, societal trends, and people (Zuber, 1999).

LEARNING ORGANIZATIONS

A sign that training, or more precisely, staff development, is being seen as a strategic process is the emergence of the concept of learning organizations. A learning organization is one in which learning processes are developed and fully aligned with an organization's improvement and strategic goals. Learning organizations are those that recognize that learning is not confined to the training function, but that there are multiple channels for ongoing learning for the employees. In this case, training becomes one of several learning modes in the company (Gephart, & Marsick, 1996).

Training's role in an organization has been concretely defined over the years. Historically, training is the logical place where trainers should be expected to be working

(Main, 2000). Companies that succeed in breaking out of the mold are taking a first step in becoming learning organizations. Because of the rapidly changing dynamics in the business world, survival for organizations requires that there be a change from a training to a performance focus in terms of staff development. Main suggested that this change in focus can take a committed organization 2 to 5 years.

This change in focus supports two critical signs that the learning-organization and human-performance models are moving closer to the strategic-planning process. It must be planned for over a multiyear period. Traditional training models rarely look beyond the current annual budget, let alone map out a long-range strategy that makes sense to the organization. Additionally, the second sign is that the change requires a champion to drive the change. That champion invariably must be someone placed high within the organization. That person, in championing the change in focus of employee learning, must also do so within the context of the organization's wider vision, known as its strategic plan.

The emergence of learning organizations has given a name to that champion: the chief learning officer (CLO). The CLO's primary responsibility is to foster a culture in which a significant emphasis is placed on learning. At first blush, this may sound a great deal like the role of the traditional training manager. However, in learning organizations, the CLO is often either the organization's CEO, or someone who has the full support of the CEO in developing a learning environment. In turn, the learning environment fully supports the strategic objectives of the organization (Simpson, 2001).

DISTANCE TRAINING AND EDUCATION

Distance training is perhaps the hottest topic in the training realm today. Distance training is actually nothing new. Step-by-step procedure manuals and correspondence education, around for decades, were the early forms of distance training. As personal computers became common workplace tools, training content was delivered digitally (Alessi & Trollip, 2001). Today, DT&E can take a lot of forms, from asynchronous self-based training tutorials to instructor-led synchronous and asynchronous learning activities. Organizations have an interest in DT&E for its apparent strategic advantages. These include the potential for lower overall cost, reduced learning times, increased retention through learner-directed review, consistent delivery of content, the ability to track participation and outcomes more efficiently, and anytime, anyplace availability (Kruse, 2000).

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