

## BEST PRACTICES

---

The study's two data sources—the observations of the select group of leading companies interviewed, and the findings from the survey of 50+ workers—may be used in tandem to shape the beginning of a best-practice road map for many companies that wish to ensure that their training programs deliver appropriate value to not only 50+ workers but all segments of the workforce.

Ultimately, although broad training strategies must be formulated at the enterprise or business unit level, training delivery must feel customized to the individual. Workers or groups of workers may have learning needs similar to those of others in a discipline or department, but preferred learning modes may differ dramatically from one individual to another. In addition, individual schedules and workloads will also vary and, as a result, so too will each individual's ability to participate in training. Given all this, companies need to think globally when it comes to training strategy (ensuring they provide the necessary range of strategically critical and relevant offerings) while acting locally (delivering training in ways and at times that respect individual learning styles and schedules).

In addition, the findings and interviews also suggest that organizations succeeding most in addressing the training needs of their entire workforce do the following:

### RECOGNIZE BOTH THE INDIVIDUAL AND STRATEGIC IMPORTANCE OF TRAINING.

Professional learning and skill development must be driven by an organization's strategic needs. And, as evidenced by the survey findings, these initiatives must also respond to employees' stated needs and desires (as expressed through surveys or focus groups aimed at gathering information directly from employees). The most insightful organizations understand that training has a dual effect. At the individual level, learning aimed at developing individual competence plays a key role in employees' mastery of their work. In a knowledge-

intensive workplace, people believe that acquiring new skills will help them in finding and keeping satisfying jobs. Learning opportunities have become central to the social contract between individuals and organizations. This "deal" dictates what employees will contribute to company success and how companies will in turn compensate employees (in both financial and non-financial currencies) for their contributions. Importantly, the gratification that comes from learning is part of the return on investment that workers receive for putting time and energy into their work and working toward mastery of tasks.

Psychologists have long recognized the importance of such mastery. "We demand a knowledge of effects," said Jean Piaget, the famous child psychologist, "and to be ourselves the producers of effects."<sup>10</sup> Psychologist Robert W. White, in a seminal article written in 1959, concluded that competence works as a motivational concept. He referred to the motivational aspect of competence as *effectance* and described it this way: "Satisfaction of effectance contributes significantly to those feelings of interest which often sustain us so well in day-to-day actions, particularly when the things we are doing have continuing elements of novelty."<sup>11</sup> Thus, acting on employees' need for learning enhances employee engagement in their work. In Towers Perrin's 2005 Global Workforce Study, which looked at the drivers of attraction, retention, and engagement among 86,000 employees in 16 countries, opportunities to learn and develop new skills was the single most important driver of high employee engagement, followed by having had the ability to improve skills and capabilities within the prior year. This finding was consistent across many of the countries in which the research was conducted, attesting to the global importance of skill-building in creating and sustaining a highly engaged workforce.

On the strategic level, learning produces an asset that organizations value. Call it knowledge, human capital, intangible capital—it comprises the information and

---

<sup>10</sup> J. Piaget, quoted in R.W. White, "Motivation Reconsidered: The Concept of Competence," *Psychological Review*, 1959, 66(5), p. 316.

<sup>11</sup> White, "Motivation Reconsidered," pp.321, 322, 323.

intelligence that individuals compile through formal processes (such as structured training and development) and through informal ones (such as contact with professional communities of practice). In the most strategically focused enterprises, the following three areas are clearly aligned and linked to each other: business strategy, organizational capabilities required to execute strategy, and the individual skills and abilities that contribute to capability-building. Interviews with training executives at organizations with strong training programs suggest that this three-link chain is well understood by these organizations and forms the foundation of their training strategy:

- *“We partner well with our customers to help them move their businesses forward. We involve senior managers in developing, delivering, and monitoring training.”* (PNC Financial Services Group)
- *“In the top-down approach, we meet with the Executive Leadership council and the Chairman’s council. We ask them to identify what their people will need to know and do over the next two years. In the bottom-up approach, we survey 1,000 directors, 2,500 managers and the one level above and below these groups to ask about their needs.”* (Pitney Bowes)
- *“The only time we really think about 50+ separately from the overall employee group is when we do strategic workforce planning and look at the capability and makeup of the workforce versus business needs.”* (Hewlett-Packard)

#### BLEND CLASSROOM TRAINING WITH SELF-STUDY (BOTH ELECTRONIC AND CONVENTIONAL).

Several of the organizations interviewed offered these examples of their most successful (and preferred) programs:

- *“We train new managers starting with a five-day orientation followed by 14 online courses over a year’s time. We try to build a sense of community as part of the learning experience.”* (Air Products and Chemicals, Inc.)

- *“We instruct employees to read articles before the training, offer a facilitated discussion during the training session and follow up with e-learning and group sessions.”*  
(PNC Financial Services Group)

- *“For all our courses—whether online, instructor-led, or self-paced—we use the Criterion Referenced Instruction (CRI) methodology to analyze, design and develop job training programs. Provided by the Center for Effective Performance, the CRI methodology allows us to create performance-based programs that ensure employees are learning only what they do not already know. Those participating in self-directed courses must pass a skill check at course conclusion. Skill checks can take various forms—on-the-job performance or a simulation, written tests or online, self-administered tests.”* (LL Bean)

#### DESIGN SPECIFIC PROGRAMS TO TARGET SPECIFIC NEEDS.

Due to concerns about how the impending retirements of many experienced workers would affect the organization’s competitiveness, Hormel instituted a program to broaden the functional skills of older workers so they can add variety to their work lives by taking on new responsibilities within the company.

*“Employers that create training programs including (even targeting) 50+ workers tend to do so because they have significant numbers of 50+ workers within their current workforces as well as specific business needs to address,”* said Randy Krug, Corporate Manager, Learning and Development at Hormel. *“Like many large manufacturing enterprises, Hormel has concerns about how the impending retirements of many experienced workers may affect the organization’s competitiveness. We include workers of all ages in our programs to broaden worker skills. For all parts of the employee population, including workers age 50+, this training enables people to add variety to their work lives by moving to new areas within the company. This job enrichment, the company hopes, will encourage more-experienced workers to keep working.”*

Some other examples of the reasons why companies develop specific training programs for 50+ workers include the following:

- *“The average age of our workforce is almost 50. We are very sensitive to the training needs of this group.”* (Atlantic Health)
- *“Over 30 percent of the Massachusetts Institute of Technology’s workforce is over 55 and there is a built-in audience for courses targeting these workers.”* (Massachusetts Institute of Technology)

Many training leaders, however, do not consider age when formulating their training strategies. These companies believe training not only improves skills and increases productivity, but also decreases turnover and enhances job satisfaction for 50+ workers and everyone else:

- *“Our training is designed to meet workers’ needs wherever they are in their careers. We haven’t found the need to focus our training on any particular age group.”* (Bon Secours Richmond Health System)
- *“Everyone has access to training without respect to age.”* (PNC Financial Services Group)

Clearly, opportunities for training and development are important across all age groups in today’s fast-changing workplace. Companies that succeed in this environment are likely to be those most adept at identifying the needs of the workforce, given the needs of the business, and delivering focused but flexible training suitable for the broad variety of learning styles of workers of various ages, educational backgrounds, and skill levels.