

**HURM 6730—Spring 2011**

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***Management Training and Development***

**Executive Summary**

In 1960, Ed Roosevelt founded Roosevelt Industries, a small polymer company in the Midwest. The company experienced steady growth up until the 1980’s when growth became flat. The 1990’s brought about technological advances that allowed the company to expand their product line. During the last 15 years of operations, the company has nearly tripled the size of their workforce now employing 1200 employees.

Roosevelt Industries is now a Tier One Supplier for both automotive and solar panel manufacturers. The company’s reputation has allowed them to catch the attention of high quality polymer scientists, chemical engineers and other technical professionals that have become part of their team. People, technology and innovation have given Roosevelt Industries a competitive advantage. In order to remain competitive, people have become a priority. Because people are vital to the company’s success, the company has contacted a consulting team to address the process of selecting, promoting and developing new managers in order to develop a results-oriented workforce.

The company is now in need of a training and development program which will have the intended purpose of helping the managers become effective, results-oriented leaders. To accomplish this goal we must begin with a needs assessment which will help to identify learning objectives. A training program can then be designed and developed around learning objectives to help the company achieve their desired results. Human resource managers will then work to carry out all aspects of the training implementation. Evaluations and follow up interviews will be conducted with the newly trained managers to measure the effectiveness of the training and development program.

**Needs Assessment**

The first step that must take place is to conduct a needs assessment to see exactly what is caused newly promoted managers of the past to fail. A needs assessment is exactly what the name implies; it assesses the needs of the trainee. If the trainee lacks in a certain area, then that is where their skills need developed in order to close the gap. This should then be the primary focus of their personal training. With regards to Roosevelt Industries, we need to determine if the problem lies within their communication strategies, knowledge, abilities to lead, etc.

It appears that the problem lies in the way promotions are carried out. **Just because an individual is a good technician, doesn’t mean they will be good at leading others**. Traditionally, Roosevelt Industries simply promotes/knights employees into management positions based only on merit and without any regard for skills sets. This is often leading to person job mismatch. **Having the knowledge of a good technician is essential to be successful, but having the people skills to lead others is vital**; which is therefore what our focus should be on when considering improving our employees’ skills.

Next, the purpose of the training initiative should be established. The purpose of this training is to make those promoted to managerial positions better leaders. While they may have the know-how, many lack the ability to manage others. This, unfortunately, has been the source of frustration amongst workers and has resulted in employees leaving the company. **This can be detrimental to the company because Roosevelt Industries is losing key talent**. What we hope to accomplish in training these newly appointed managers is to prepare them to take on the responsibility of being the head person in their department.

**It is imperative to better equip your newly appointed managers for their positions; giving them the right tools/skills to do their job**. Since the problem doesn’t lie in the managers’ knowledge or skills of how the work is performed, but rather in their attitudes/knowledge of how to be an effective leader, we must focus on changing their mindset from simply being a good worker to a good leader.

For this reason, we need to define the program learning objectives to ensure that we are teaching the right skills and staying on track. We will conduct a training seminar that will focus on improving skills which are outlined as essential in the job description (Appendix A) such as:

* Effective communication
* Increasing team cohesiveness
* Leadership/motivation strategies
* Problem solving strategies
* Proper planning skills

By focusing on the above list of skills, training methodologies have **proven** to enhance a managers’ ability to lead their subordinates and prepare them for their new promotion within Roosevelt Industries.

**Design**

This training initiative should first be given to current managers and then secondly to any new managers or any employees who will soon be promoted into managerial positions. It is possible to just train new managers. However, it is imperative that all mangers and their supervisors be on board with this training initiative to promote the buy in from all new managers. If commitment starts at the top, those lower on the pyramid will be committed too.

Before training can begin, a budget is required and absolutely imperative to designing a training plan. This budget will be used as a planning tool to set financial limitations and outline how the dollars will be used. While developing the budget, it is necessary to ensure that enough funds are being allocated to cover the implementation of all necessary tasks. CEO Chuck Breese, the business planning analyst, and a representative from the consulting firm have come together to develop a budget based on the elements of the learning objectives. The itemized budget for the management training and development program will be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| Description | Cost PerPerson | No. of Attendees | Costs |
| *Off Site - Management Training Seminar* | $ 125.00 | 25 |  $ 3,125.00  |
| *Management Development Software* | $ - | - |  $ 425.00  |
| *Training Manuals* | $ 15.00 | 25 |  $ 375.00  |
| *Certificate of Completion* | $ 3.00 | 25 |  $ 75.00  |
| Total Costs |  |  |  **$ 4,000.00** |

The next step is to select our trainers and support staff. One way to gain credibility of our trainers immediately is to hire an outside consultant to conduct the seminar. This way, hierarchies within the company will not get in the way of our trainees learning and we will also benefit from having an expert present the material. The director of human resources and a select number of currently effective management staff will be called upon to cover different sections of the management training program.

Internal training will allow the current managers to communicate their own experiences and what they believe to be the types of leadership skills necessary to manage direct reports. This will also allow new managers to ask questions about the challenges that current managers faced during transition and how to maintain peer relationships after being promoted.

After the trainer and support staff have been chosen, a curriculum and instructional methods must be selected.

The five day training curriculum will begin with a two day management training seminar. We feel that by first having a two day management seminar, we would lay down a solid base for which to build upon before going into training more specific to Roosevelt Industries. The two day management training seminar will be a broad overview of what it means to be a leader, while the rest of the training days will be spent applying that knowledge to Roosevelt Industries. The management seminar will cover case studies in management that include the following:

* Sensitivity training
* Conflict resolution
* Lessons on how to effectively communicate
* Coaching/mentoring skills

The remaining three days will involve internal training. Once the management training seminar is completed, the trainees will have a better idea of what it means to lead others, then we will hone in on the specifics regarding their leadership roles within Roosevelt Industries. This training will consist of scripted role playing, DVDs, e-learning via training software, and team building exercises. Topics to be covered include:

* Policies and procedures
* Roles and responsibilities
* Building working relationships
* Communication/feedback
* Problem solving skills

At the conclusion of the training program, a certificate of completion will be given. The new managers will then be assigned to shadow current managers once a week on a rotating schedule for the next eight weeks to gain real world, on the job experience. This is the follow-up methodology that we feel would be most beneficial for the new managers because it will allow them to see how the interaction between managers and their employees.

 Since being a leader is not knowledge based, a simple pencil and paper test periodically will not be effective, continual observation of their behavior is the best follow-up procedure we could follow. This would help to monitor the employees, grasp where they stand and assess whether they require any further training in specific areas.

To reduce cost and control time, the location of the seminar and training sessions will be on-site. It would be also easier to train employees on-site where resources are readily available.

We will utilize the company’s large board room within the administrative offices to conduct this training so there are no distractions to the trainees during the training sessions. This room will be comfortable, familiar, sound free and cheap for the company to utilize and should provide for the best learning environment.

After the training has been designed, procurement of the training materials such as videos, paper and quizzes will follow. Experts will be contacted to conduct the actual training sessions. It is necessary to have these tasks completed getting before actual training starts to prevent any disruptions during the actual training program.

**Actual Training**

Upon arrival to the actual training and prior to beginning the first seminar, trainees should be pre-tested. This will later be used in comparison to post-tests which will determine whether or not the five day training curriculum was effective. The only way to ensure that the trainees are absorbing the information you are teaching them is to compare the before and after knowledge of the trainees.

Another benefit of pre-testing the trainees is to provide them with an ego check. What this means is that while many don’t think they “need” training, the pre-test should show them that if they cannot correctly answer the questions, then they will definitely benefit from the training sessions.

Actual training should begin with an introduction of all employees to break the ice and a short game to get everyone having fun and become engaged would be beneficial. A facility tour might also be beneficial to give the trainees a better idea about the workplace as a whole and the people who will be around the trainee.

The trainer should then review the training manual to inform the trainees as to what they are expected to learn/gain from this five day training program. Since the employees as well as the managers already have the technical skills, the newly hired managers need to be trained on effective leadership skills along with various financial aspects of the company. Coverage of financial aspects may potentially aid in reducing the effects of the credit crunch currently prevailing in the organization.

Training will consist of the following leadership aspects:

* Actual business communication
* Conflict resolution skills
* Team building
* Time management
* Delegation skills
* Goal setting

Management trainees should also be given the knowledge on how to reduce debt and paying the suppliers in a timely manner to avoid any further credit crunch in future. In the past, as they lacked financial and business knowledge required for running an organization, they had problems such as credit crunch as well as market downturn. They had more technical skills in comparison to financial and business skills.

Role playing will give them a sense of ownership in various situations. They will be able to know how to respond given different manager/employee scenarios. For instance, if they put themselves in the place of any of an executive in a financial department dealing with an employee, they would get a better idea of how to address and handle a situation.

**Post-Training**

In addition to a pre-test, trainees will be given a post-test immediately after the training as well as two weeks after the training session. Comparing these results will answer the flowing questions:

* What the trainees learned during the training session?
* How much and what information they retained preceding the training?

Weekly homework assignments will be given to the trainees to complete as well as weekly online quizzes. This will determine how well the new managers are applying the skills they have been taught. From the results obtained, the trainers will know what to do or not do in future. They will know whether they will need to adopt new techniques for the better learning or continue their current practices. This will also help to empower employees by giving them a sense of ownership which will motivate them to work more efficiently.

It is also imperative to conduct training evaluations for the trainees. This will allow the trainers to gain valuable information about how the trainees perceived the training sessions. The trainers will be able to determine whether the trainees:

* Felt as if they learned the objectives set out for the training,
* Thought the training was relevant to their positions
* Enjoyed the training, which is an important aspect to absorbing the information and more.

This is a very important part of the training because it is a good way to determine if the resources, such as money and time, being used for the training sessions are being wasted. If it is determined that the trainees absorbed the information, then the training sessions were not a waste of time and the trainees did gain knowledge of how to become more effective leaders in the workplace.

While absorbing the information learned is very important, it is even more detrimental to the company that the information learned by the trainees is being used and implemented on their jobs. The best way to determine if the newly trained managers are using the information learned via training is to evaluate them on the principals in which they are being asked to implement.

This means that the objectives of the training sessions should be incorporated into the performance evaluations. Once the criteria upon which the managers will be evaluated on is determined and appropriately communicated, they will be expected to fulfill the job duties laid out before them. Some of the important issues addressed in the training that should be incorporated into the evaluation system include:

* Effective communication
* Increasing team cohesiveness
* Leadership/motivation strategies
* Problem solving strategies
* Proper planning skills

One of the most important parts of ensuring that managers are in fact using these new skills and applying them on the job is to ensure that the company is rewarding those managers for the behaviors they are trying to instill. This means that if the company values communication and leadership over numbers, then reward managers who are more effective at managing than those who are all focused on numbers rather than their subordinates. The rewards (promotions, bonuses, etc...) must match the desired behaviors of the managers.

Performance evaluations for Roosevelt Industries should also become more frequent. Evaluations should not be performed every once in a while but rather should be done on a continual basis. Whenever managers are seen implementing training objectives/ideas/skills, they should be praised or rewarded for doing so in order to encourage managers to keep up the efforts.

Formal performance evaluations should also be addressed in how often they are conducted and how. Observations should be done on a continual basis rather than in a day or even a week. They should also be conducted more often than the normal annual or bi-annual evaluations. The more often they are conducted and constructive criticism and/or praise is given, the more productive the managers will be. Therefore, formal performance evaluations should be done on a continual basis but turned into HR every two months for approval. This will ensure that managers are constantly getting feedback on what they are doing right and where to improve. If this procedure is fully implemented, then our managers’ performance should undoubtedly improve.

Another aspect of the training initiative which is imperative proceeding the initial training sessions is to follow-up with the trainees. A few things should be addressed in order to ensure full comprehension and compliance with the training objectives. Roosevelt Industries should:

* Provide follow-up sessions for trainees to ask any questions that arise. This can be done every month to ensure that the managers are using their knowledge and skills to the full capacity.
* Make the training materials available to managers so that they can revisit the information whenever needed. This will allow them to implement the materials into their everyday job in the proper way.
* Provide continual feedback and job coaching to the managers. (As stated above in Post-Training Evaluation)
* Encourage those managers to train others on the materials they learned via the training sessions. This will 1) reinforce what they know, and 2) encourage the knowledge to be spread even further.

**Continuous Training**

One way to determine if this training initiative has worked is to monitor things such as decreased turnover, decreased grievances against managers, etc… This can be difficult to monitor because it can be quite difficult to measure a good manager on paper. For this reason, monitoring issues we had in the past is a good indicator that the training initiative is working and resources are not being wasted.

One very important thing to remember is that training is never finished; it is a continuous process that never ends. Determining the needs of your employees continuously via evaluations and follow-ups is imperative to creating the best possible work environment within the company. Hence this process should be repeated any time there is a need for additional training.

**Appendix**

1. Job Description



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| --- | --- |
| Job Title: Engineering Manager |  |
| Position Type : Full Time |  |
| Job Description |
| Job Purpose:To direct and coordinate engineering processes based on sound engineering and economic principles while using lean manufacturing and six sigma tools to ensure assignments and projects are completed effectively and efficiently while maintaining the high standards of manufacturing safety.​Duties:* Manages staff of engineers and technical professionals to assure compliance with policies and procedures
* Maintains a professional level of expertise within the team through training sessions
* Work closely with Finance & Accounting and Engineering Services Manager on all budget related projects and programs.
* Continuously improve the engineering process efficiency and accuracy
* Schedule and manage jobs and projects
* Supervise, train, mentor , coach, discipline and appraise direct reports
* Organizes and develops assigned staff with appropriate management, professional,

Supervisory techniques to provide increasingly effective performance.* Responsible for work habits and work environment of the department to minimize personal injury and other unnecessary losses.
* Identifies, documents and resolves workplace performance issues

**Skills:*** Ability to plan, coordinate, and conduct meetings efficiently and effectively.
* Demonstrate leadership skills by achieving good results in difficult circumstances.
* Ability to be concise, clear and direct in both written and verbal communications.
* Organizational skills developed to keep work flowing smoothly, lines of authority and areas of responsibilities are clearly defined, and reaction to changing situations is smooth.

**Specific Requirements:*** Bachelors Degree in engineering field with 5 years minimum of related experience in a management capacity.​
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