

Talent Development 13 Business Insight

by Bob Whipple, MBA, CPTD



Section 3.1 in the CPTD Certification program for ATD is **Business Insight**. The first bullet reads, “A skill in creating business cases for talent development initiatives using economic, financial, and organizational data.”

In this article, I will describe the process I use to create, refine and present business cases to potential clients.

A proposal to do some training and development work has little chance of being approved unless you can identify the benefits that will accrue. One mistake that consultants often make is to consider only the tangible or visible benefits such as higher output, greater safety, or better quality.

Usually there are intangible benefits that are not immediately or easily measurable but that have a profound impact on the operation in the long run. These concepts might include the impact of training on trust, morale, or teamwork. Often these intangible benefits dwarf the more visible things that can be measured physically.

If the training is highly experiential rather than just reading and listening to lectures, the impact on personal growth will go well beyond what is in plain sight. This is why I design my programs to have a great deal of variety of experiences where the participants actually become part of the action. These experiences include several role play activities, body sculpture, assessments, polls, breakout sessions, magic illusions, videos, group and individual activities.

My rule of thumb is to have some kind of hands-on activity for every 10-15 minutes of information sharing. That level of involvement allows the group to stay sharp through multi-hour sessions. I also provide a physical break every two hours and provide refreshments, if the session is in person.

I work from PowerPoint Slides but follow a rigid protocol to avoid “death by PowerPoint.” All slides are on a totally white background. Usually there are only 5-6 bullets with large text with less than 8 words per bullet. Each slide has a real photograph (not clip art) that I have downloaded and purchased. The photos are indicative of the content on the slide and are often whimsical in nature.

I never read the PowerPoint bullets verbatim. I discuss the content and let the participants read the actual words while I am talking. Of course, I share the slide program for later review and recall.

Considering these presentation details, there is a lot of teambuilding going on while I impart the subject matter. That improved teamwork serves to enhance trust and build morale, which both translate into productivity for the group.

It is common to have productivity increase by more than 50% as a result of training a family group for just a few hours.

I also customize all training for the specific needs of the group. I have a survey instrument with about 100 different areas where training might be considered. The participants tell me ahead of time which items have the most value so that I can customize the program to be focused on the areas of greatest return.

I determine any extant data that is available for the group. I will review things like Quality of Work-life Surveys, Turnover data, Grievance Reports and other data that is available on the prior state of the group.

I also customize all slides to be industry specific, so that the training will translate into the language the particular organization uses daily. I want all of the participants to get the feeling that this training was designed specifically for them because it was.

Taking these steps allows me to present a business case to the organization that is thorough, balanced, and tailored to be laser-focused on the needs of the specific group.

Bob Whipple, MBA, CPTD, is a consultant, trainer, speaker, and author in the areas of leadership and trust. He is the author of: *The Trust Factor: Advanced Leadership for Professionals*, *Understanding E-Body Language: Building Trust Online*, *Leading with Trust is Like Sailing Downwind*, and *Trust in Transition: Navigating Organizational Change*. Bob has many years as a senior executive with a Fortune 500 Company and with non-profit organizations.

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