

The "Whatchamacallit" Process

How to Handle Requests for Training

Fred Nickols

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Trainers are regularly presented with requests for training. Some of these requests are tentative and vague; others are quite specific and demanding. And a few are downright questionable. How a trainer responds to such requests is important to the person making the request, to the larger organization, and to the trainer. This paper presents a practical process for handling requests for training that should serve the client, the organization and the trainer equally well – without placing the trainer in the able position of challenging the request or confronting the requestor. NOTE: This paper is being lished in two parts in Training Journal in June and July 2010.

What's A Trainer to Do?

What is it trainers do when they are presented with a request for training? Do they salute smartly, say, “Aye-aye, sir,” then march off to develop and deliver the requested training? Maybe. Or do they instead push back, arguing that training might not be the solution to the problem and propose instead to conduct a needs assessment or a performance analysis? Maybe. Or do they perhaps say something like, “Sure, we in Training are always glad to lend a hand. So tell me, what kind of impact or results are you expecting from this training you’re asking for?” Maybe.

Whatever they do, trainers are regularly faced with having to respond to requests for training. On occasion, these requests are directives, not mere requests. And sometimes these directives are literally mandates, rooted in legal requirements that demand compliance. In addition to requests, directives and mandates, other occasions trigger efforts that might (or might not) lead to training. Training departments are often tasked with identifying their company’s training needs, either in general or in support of some major initiative such as the introduction of new technology, systems or processes. Employee turnover, reassignments and promotions also suggest or imply the need for training. And, to ensure their own survival, training departments frequently try to ascertain the training needs, wants and preferences of employees and departments.

The Training Request Handling Process

Whatever they do, and however they do it, what they do is a *process*, an organized, structured way of getting from some starting point to some end point; in this case, from a request for training to a response to that request. The process might be highly organized and tightly structured or loosely organized with minimal structure; crystal clear or somewhat murky; well understood and widely accepted or barely grasped and hotly disputed. It might be rigidly procedural or it might unfold in response to the conditions at hand.

One such process is Training Needs Assessment (Rossett, 1986, 1987, 1999a, 1999b). But even a cursory review of the literature reveals that different people use this label to refer to very different processes. Moreover, the use of the term “Training Needs Assessment” has been subjected to intense criticism. So what’s a trainer to do?

My aim in this paper is to sketch the outlines of a process trainers can use to get from a request for training to the training itself – or perhaps to some other outcome. I won’t call this process a “Training Needs Assessment” or a “Training Requirements Analysis” or a “Front-End Analysis” or a “Performance Analysis.” I’ll simply refer to it for now as “The Whatchamacallit Process.”¹ It is depicted in Figure 1.

¹ So far as I know, the term “whatchamacallit” was first used in relation to Training Needs Assessment by Allison Rossett (1986) in her contribution to *Introduction to Performance Technology*, edited by George Geis. Her chapter, which follows Roger Kaufman’s chapter on assessing needs, is titled “Commentary: Analyzing, Assessing, and Disambiguating *Whatchamacallit*.” In her commentary she argued that performance technologists (and I would add trainers) who are charged with correcting performance problems aren’t interested in fine distinctions among needs, tasks, problems and front-end analyses. Instead, they want to know what to do first, next and last so as to acquire a confident understanding of the situation at hand and, by implication, how best to handle it.

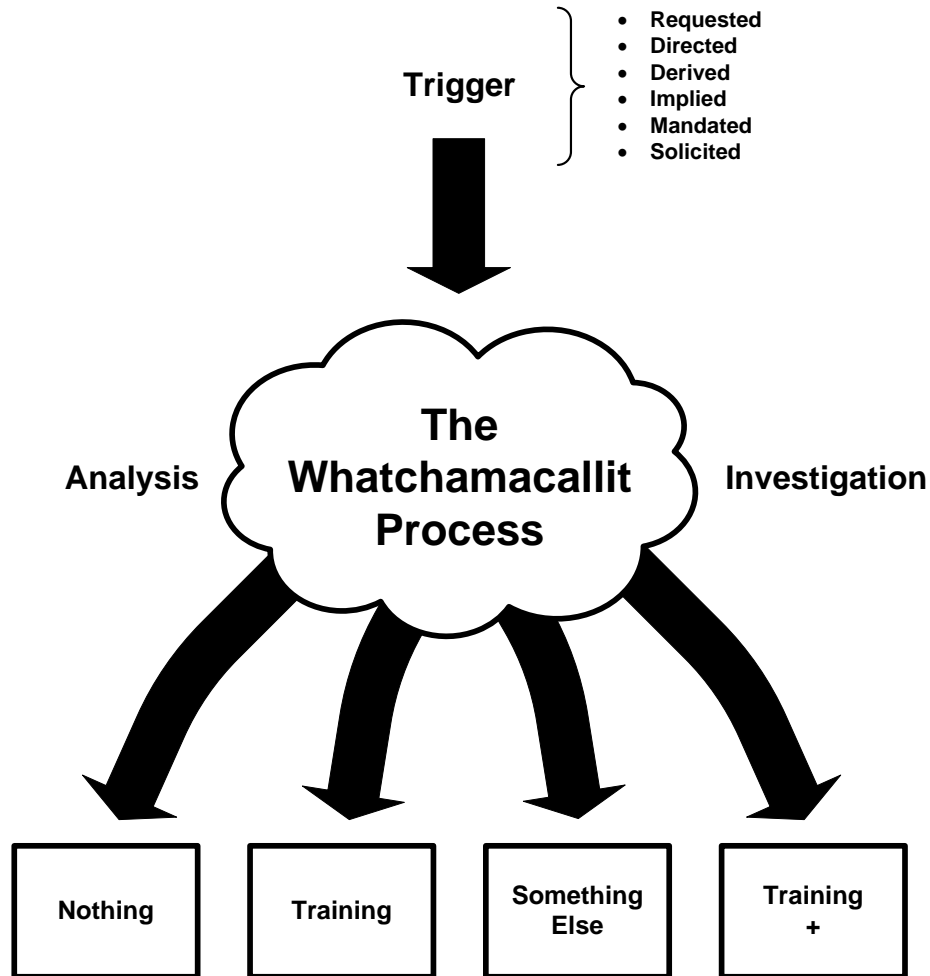


Figure 1 - The Whatchamacallit Process

The Whatchamacallit Process

One of the most important things to do in defining any process is to set its boundaries, to say where it begins and where it ends. The Whatchamacallit Process (which, for short, I'll call "The WMC Process" from here on) is bounded on one end by the triggers listed in Figure 1 and on its other end by an array of possible outcomes. Regarding the kinds of situations with which we are here concerned, there are only four possible general outcomes of The WMC Process.

1. Nothing comes of the effort.
2. It results in training.
3. It leads to something else, perhaps job aids, or improved feedback or work redesign.
4. It leads to training plus something else.

The task facing the trainer or other professional confronted with one or more of the triggers at the top of the diagram in Figure 1 is one of looking into the circumstances of the situation to determine which end or outcome is appropriate. That partly investigative and partly analytical process is The WMC Process shown in Figure 1.

How it's Done

How, then, does one do that? How does one “look into” or “investigate” or “analyze” situations and circumstances marked by one or more of the triggers listed in Figure 1? The short answer is that you probe; you ask a lot of questions. This needn't be a long or confrontational process. Consider, by way of illustration, the story that follows, provided by R. John Howe, until recently, head of Training for an agency of the U.S. Department of Labor.²

The initial conversations in which an organization approaches an internal or external training or performance consultant for help are critical to the success of the prospective relationship and project, as well as among the most difficult to undertake, and about which to give useful advice to practitioners.

The prospective client has seen something that sends the client in the consultant's direction. Often the client feels that the problem has already been diagnosed pretty well and is only looking to the consultant to implement a corrective response (often the client will have notions about what this is as well).

The consultant comes to this conversation with an array of tools and skills in diagnosis, objective identification and statement, learning design, intervention building, implementation and evaluation. The consultant's preoccupations are likely with deploying and employing these skills to deal with the prospective client's stated problem. The language of the consultant's world is technical and can be off-putting to prospective clients.

So, the initial conversation is both a very important and a very tricky thing and the best way of handling it is very difficult to suggest in general. I think, though, that it is best simply to move to working on the problem stated by the client without reference to such things as a “needs analysis,” etc.

Remember that the prospective client has definite pictures of the situation and preoccupations. Often such clients are busy people and expect conversations to be short (maybe typically 15 minutes) in which they describe the problem and give directions to the consultant about what they want done.

This means that at the end of every exchange in his/her conversation with the consultant, the prospective client will have to have a reason for continuing. The consultant's questions and responses must continue to seem to the client to be grappling effectively with the problem situation the client is concerned with. The prospective client will have a keen sense of when a consultant response or question seems to move to consultant concerns that are not centered on quick, effective action focused on client concerns.

I once observed an instance of such a conversation that so impressed me that I wrote it up and turned it into an “in-service” sequence for introducing new members of my staff unit to these kinds of front-end conversations with clients.

A staff manager in a national office came to my boss and asked for help in organizing and presenting some training reinforcing some regional wage determination specialists' understanding of the regulations they were supposed to be applying in their work.

My boss asked if we could come talk to the staff manager about it. (no mention of “diagnosis,” “needs assessment,” “performance analysis,” etc.)

² John originally posted this story to the TRDEV-L list on Yahoo groups and, lightly edited, it is used here with his kind permission.

In that conversation, my boss – without announcing anything about what he was about – began asking this manager what he was seeing that made him want to organize this training of the regional specialists.

The staff manager said that his organization was charged with conducting wage surveys that determined the wages to be paid to workers on federally funded government contracts. The contracting agencies wanted the surveys done quickly so they could let their contract proposals. The contractors wanted the survey results to be as low as possible. The unions wanted the survey results to be as high as possible. It was a political football and the cost of errors was potentially very high on several different dimensions.

My boss asked what the current error rate was. The manager said that the surveys were in fact not conducted mostly by the regional specialists although they could do some work by phone, but rather by employees out in the district offices who were primarily investigators and who conducted the surveys as an ancillary duty.

He said that the regional specialist would assign survey work to the district offices and the investigators there would conduct the surveys and send the survey results into the regional office.

The regional office would check the survey for errors (usually jobs omitted or for which insufficient data had been collected) and when they were satisfied with a survey they would send it into the national office.

The national office (this staff manager's office) would also check the survey to determine if it was sound. He said that at the moment about 50% of the surveys being received by the regional offices were not adequate in some sense and that about 50% of the surveys being received by the national office were similarly deficient.

My boss asked what was done at both the regional and national office levels when a deficient survey was identified. The staff manager said that it had to be repaired, sometimes redone. "And who does that?" my boss asked. At the region, the staff manager said, they usually send it back to the district and ask that the repair be assigned to an investigator other than the one who did it originally. Sometimes they do minor repair work at the regional level by phone. At the national office level, too, repair work is sometimes undertaken, always by phone. But one way or another, the survey has to be made a sound basis for issuing a set of wages because the politics involved are so intense.

My boss asked what it cost on average to redo a defective survey. At this point the staff manager asked, "Where is this going? Why aren't we planning this regulation review session with the regional specialists?"

"Well," my boss said, "we've already discovered that many of the survey errors are made by investigators not just by the regional specialists. Since it seems likely that we'll need to do something about this set of errors as well, we're trying to discover how much they are costing you so that you will be in position to justify dealing with all the sources of survey errors."

This was the trickiest aspect of this conversation but it made sense to this staff manager (he was smart, very knowledgeable of his world, a good politician and a flexible thinker, some things you don't always get in a client).

It turned out that the staff manager was quickly able to estimate that survey errors were in fact costing more than \$1 million dollars to redo annually.

Moreover, the diagnosis (notice it was never called that) revealed not only that any effective inter-

vention must focus not just on the regional specialists, but also on those investigators who were assigned survey work.

Further, it had revealed that an important feedback loop was missing for both investigators and regional specialists who submitted deficient surveys. In both cases someone else made the repairs and the investigators and regional specialists usually did not even know they had made errors.

Ultimately, we designed a short training session for the regional wage specialists (and some selected investigators) but we didn't give lectures on the regulations. Instead we collected instances of survey requests that seemed often to be difficult to survey and built classroom situations in which participants practiced doing surveys properly.

But in truth, even this training was not the center of the ultimate intervention. It was instead a feedback form to be completed at the regional and/or national office level when a submitted survey was reviewed. Copies of this form were kept at the regional and national offices to permit analysis of most frequent error patterns and, most important, returned to the person who had done the submitted survey with a request for repair.

Now this is a long story but I think it shows well how one can go about conducting the critical initial conversation with a prospective client-manager that both avoids the jargon of our field and demonstrates at the end of every exchange in the conversation that the consultant is working actively on the problem that the client is experiencing in ways that make sense to the client.

In closing, the words you use in such situations are extremely important but I'm not sure there is any way of talking in general about what to say specifically.

As the story above illustrates, getting from the beginning of The WMC Process to its end is a matter of investigation and analysis. This kind of process is configured or "crafted," not prefigured or "canned." It takes shape as a result of the information and understanding derived from asking questions. It goes where the information obtained and the analysis of that information takes you. It is a form of detective work, not production work. It is, in the last analysis, an operational process that is also a form of intelligence work, a matter of piecing together a coherent, sensible and defensible picture of the situation based on bits and pieces of information, often gathered from various sources.

The cloud-like shape of The WMC Process in Figure 1 is deliberately meant to suggest a degree of vagueness or uncertainty that is often a quality or characteristic of the starting point for many an effort. Even if the trigger is a mandate backed by legal force, there remains the matter of determining the conditions that must be met in order to satisfy that mandate. Nothing is ever crystal-clear at the outset. The basic nature of the process, then, is one of probing, of investigation and analysis. The WMC Process can be viewed as having four major areas of activity (see Figure 2):

1. Clarify the Ends
2. Account for Any Gaps
3. Look for Links
4. Decide and Respond

Clarify the Ends

Sages through the ages have advised us to focus on ends. *Ecclesiasticus* 7:36 reminds us that "Whatsoever thou takest in hand, remember the end, and thou shalt never do amiss." Lucan (A.D. 39-65) admonished all to "keep the end in view." In his *Fables*, Jean de La Fontaine (1621-1695) said, "In everything

one must consider the end.” More recently (1989), Stephen R. Covey, no doubt recognizing a tried and true notion, made “Begin with the End in Mind” the second of his “7 *Habits of Highly Effective People*.”

The first questions you ask pertain to the ends sought by your client. Ask questions of your client like these:

- What factors suggest to you that training is an appropriate response to this situation?
- Assuming we deliver the training, how will you tell it has been effective?
- What impact do you see the training having on performance or other results? Will error rates go down? Will productivity go up?
- What will be different – new or better – as a result of the training?

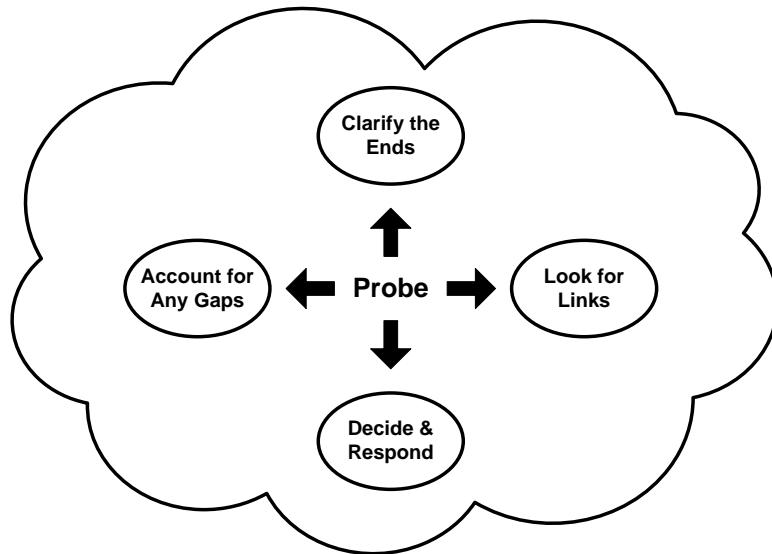


Figure 2 - The Four Areas of the Whatchamacallit Process

Avoid making the client feel “interrogated.” Remember: You’re there to help so make it clear that your questions and probes are meant to help you provide the best possible response to the client’s request.

Account for Any Gaps

The gaps you’re trying to account for here are those between the ends your client seeks – the desired results – and current results. It’s not enough to simply identify any such gaps – that’s a comparatively simple matter of defining current and desired conditions. The important task is to account for those gaps, to be able to say why current conditions or results are what they are. Unless you know what is giving rise to current conditions, you’re not likely to be able to say what kind of intervention might transform them into the desired conditions. Here is where performance analysis and lots of *why* questions come into play. If people aren’t performing as required, why is that? Is it because they don’t know how? Or is it because they don’t receive feedback or because the incentives are wrong or because the work itself is poorly designed? If the expected outcome is organizational, perhaps increased sales, what accounts for the current level of sales? If your client wonders why you are poking around in such matters, say that it’s because you are trying to establish the links between training and the results your client is after, that you are doing your best to ensure that the requested training produces the desired results.

Look for Links

What you’re looking for, of course, are links between the results your client wants and the means at your disposal, the range or kinds of interventions you can provide or that you know enough about to identify as relevant. The links to training are through performance and behavior to skills and knowledge. The links to other interventions might also tie to skills and knowledge, behavior and performance. Then again they might tie to organization, to process design or process controls, perhaps to mixed signals or conflicting priorities. You won’t know until you go looking.

Decide and Respond

In the last analysis, it's your call. You have to decide what to do and respond to your client. The chief criterion is that you can and should do what makes sense to you in the situation and conditions you face. You are still probing, trying to ascertain what is acceptable, feasible, responsible and professional. That might be to do nothing at all, to deliver the training requested, to propose something else or to propose some mix of training and other interventions.

Whatever you decide, your response will more than likely take the form of a recommendation accompanied by a rationale. This might be quite formal or informal; it might include estimates of impact and a forward-looking ROI calculation or it might contain no such information at all. Remember, whatever you decide and propose must make sense to you and your client, and it must be defensible in terms that are accepted in your organization. "Swimming upstream" is great for salmon but remember what they do when they get there. Go with the flow, not against the current. It's your career, it's your life, it's your neck and it's your call.

The four end points of The WMC Process are described below in terms of some of the reasons you might wind up at each one.

1. Nothing. Several reasons might combine in ways that lead to doing nothing at all. Some of these reasons tie to the fact that Training and trainers are just as obligated as anyone else to be good stewards of the organizational resources they command and some tie to trainers' obligations to practice their craft in a responsible, professional manner.

- Inadequate justification for the training
- The request evaporates after a little probing
- Higher priority issues demand attention
- The Training department is strapped for resources
 - People
 - Money
 - Time
- Training is clearly and simply not an appropriate response

2. Training. You might arrive at the decision to simply respond to the request for training, either as originally conceived or in some modified form, for several reasons as well. Some of these are as follows:

- Training is or can be made to be a "fit" with the situation
- Training is indeed an appropriate intervention
- Training will make a difference
- Training is the right thing to do
- Training is a smart move politically
- Training has been mandated or ordered
- You have no choice

3. Something Else. Depending on your investigation and analysis, as well as the range of interventions falling within your purview and capability, not to mention your clout and credibility, you might decide to propose something other than training (e.g., job aids, performance aids, improved feedback, tighter controls, process modifications, the use of technology and other avenues that lead to the results sought by the client. Reasons here include those listed below.

- Training obviously won't make a difference

- Other interventions are more likely to make a difference
- You can offer, obtain or broker these “other interventions”
- The links from desired results to these other interventions are clear
- The case for these other interventions is compelling – to you and your client

4. Training +. Here, you propose training plus some other things. Why? Quite simply because training is frequently a piece of the puzzle but rarely all of it. Many of the reasons above for training and for something else apply here.

Parting Comment

Some will argue that The WMC Process goes beyond what a “mere” trainer can be expected to do; that trainers lack the knowledge, skills, clout and credibility to carry out such a process. Maybe. Maybe not. But unless and until organizational rosters are filled with what some call “performance technologists,” it falls to trainers to handle and process requests for training and other triggers that mark the beginning of the WMC Process and to reach a resolution that makes sense in light of the circumstances. In short, often enough, there is no one else to do it and if trainers don’t do it, we all know where that leads: Why, straight to training of course.

Annotated References and Readings

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2. Ferrell, B. (2002). “Needs Analysis Books, Papers and Links.” Available on the web at [http://www.phoenixziareources.com/Needs Assessment and Analysis Books](http://www.phoenixziareources.com/Needs_Assessment_and_Analysis_Books). Bev began this list when she was the moderator of the Yahoo Groups TRDEV list. That list is now defunct but her list is still available.
3. Rossett, A. (1986). “Commentary: Analyzing, assessing, and disambiguating *whatchamacallit*,” in Geis, G.L. (Ed.) *Introduction to performance technology, Vol 1*, pp. 60-67. Washington, D.C.: The National Society for Performance and Instruction. It was this article that led me to use “whatchamacallit” in the title of this one.
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About the Author

Fred Nickols can be reached by e-mail at fred@nickols.us. Other articles of his can be found on his articles web site at www.skullworks.com.