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Financial Consulting Company Employs Life Cycle Institute Learning Consultants to Transform SMEs into Learning Facilitators

The Situation

A financial consulting company was hired to support an ERP implementation project for a large government agency. The consulting company provided different forms of implementation support, including data verification and system configuration services. To increase the value they could bring to their client, the consulting company provided pre-implementation training. The training aimed to prepare ERP-users for interface changes, maximize user adoption and minimize input errors once the system was live.

Senior financial consultants delivered the initial training. Feedback from the client was that although the instructors were very knowledgeable, it was hard to connect the classroom instruction to what trainees were to do differently once back at work.

The consultants were clearly subject matter experts (SME) who knew their training constituents; however, they were not prepared to deliver a training program that empowered people to practice new behaviors and embrace new processes. The consulting company needed to prime its SMEs to become facilitators of learning; therefore, they contacted Life Cycle Institute Learning Consultants.

The Solution

Institute Learning Consultants (LC) met with the financial consulting company sponsor and SMEs to discuss a “day in the life” of their training engagements. The LCs facilitated a discussion of what the SMEs thought were their delivery strengths and what they saw as their biggest challenges in front of the classroom. The LC introduced the 8 facilitator competencies model and explained how they would define the SME’s strengths and create an individual development plan together.

The process was executed as follows:

- Institute LCs scheduled time to observe each SME deliver a class. Prior to the class observation, the LCs asked for a sample of the course materials to become familiar with the course design.
- As a result of the observation, the LC gave the SME a rating of basic, intermediate or advanced level in each of the 8 facilitator competencies. Meanwhile the SME completed a self-assessment. The LC and SME discussed strengths and defined two competencies to concentrate on: one with the greatest impact and one with the greatest speed to improvement.
- The LC and SME created an individual development plan that targeted specific actions, support needed and a timeline to reach the mutually defined competency goals.
- The LC shared specific ideas with the SME on how to make the existing course design more active.
- The LC scheduled another time to observe the SME, repeating the same procedure to define individual performance goals and timeline.

In this instance, the LC and SMEs determined that a group Train-the-Trainer workshop would speed all SME developmental progress.

The purpose of the course was to provide a structured environment where SMEs could practice tools and techniques to move from a content resource to a facilitator of learning. The SMEs were asked to complete learning impact maps prior to participating in the workshop. The learning impact map primed the SME for the course by defining 1-2 learning goals the individual would focus on during the course and practice after the course. These goals were directly linked to each SME's individual development plan created earlier.

After completing the Life Cycle Institute Train-the-Trainer class, Learning Consultants spent one-on-one coaching time in the classroom to reinforce application of course concepts and update individual development plans.

The Business Impact

The financial consulting team was able to deliver more effective training by implementing learning facilitator best practices.

The financial consulting company developed a trusted advisor partnership with their client for a more successful implementation.

The team was able to secure more business with the client because of their dedicated approach to helping the client be successful through education and training.

The company secured employee engagement by allowing developmental opportunities for its employees.

About the Life Cycle Institute

The Life Cycle Institute, the premier learning source for optimizing Learning, Leadership and Change, uses adult learning methods that minimize lecture and emphasize hands-on learning. Classes are led by facilitators that actively practice what they teach. The methodologies taught within the various course curricula are practical applications with proven track records – proven through actual activities carried out regularly by LCE professionals.