Nominating Your Qualified Trainers: It's More Than Seniority And Technical Expertise
By Vivian Bringslimark, President HPIS Consulting, Inc.

"Oh, not again! Not another follow-up email requesting names for the QT Workshop!" If you're like most managers, you probably don't give these requests high priority. Usually, when pressed for supporting documentation to complete the paperwork, you sigh and move on to the next email. It's not that you intentionally want to ignore the request or that you don't support the program, you just don't know what it really takes to become a qualified OJT Trainer, and therefore, which of your SMEs you should send. So you send the names of all of them, or you send your best technical SME.

Not all SMEs know how to train others

Many managers of technical departments such as manufacturing, analytical laboratories, and facilities/engineering often assume their best performers also have the ability and skills to train others. Yet many technicians and lab analysts work alone. They mastered their knowledge and skills, but few can deliver instruction that is effectively transferred back to the job. They are usually unaware of adult learning theory or ways to increase interest or enhance retention. It takes more than technical expertise or being the most senior staff member.

SMEs don't always know they are SMEs

Clay Carr, author of *Smart Training*, describes subject matter expertise in terms of mastery. SMEs have the knowledge and know-how to perform. They have the means to perform effectively and at least one motive to perform. And, they must know they have the competence and understand they can use that competence successfully. . According to Carr, what separates them from their peers are the following characteristics:

- more willing to aim high
- will stick with difficult project/task longer than those who lack mastery
- constantly increase their competence.

Interestingly, it isn't until someone refers to them as an SME that they realize this mastery of knowledge and skills. However, being an SME or being perceived as a technical expert is not a one size-fits-all definition. This might explain some of the confusion surrounding what it means to be an SME. Chuck Hodell, author of *SMEs From the Ground Up*, denotes the importance of "some tangible, reliable, and documented evidence to support 'expert standing.'" Whether the SME is a technical or content expert

or considered best of the best by their peer group, they do provide "specific, detailed information not considered to be common knowledge among the general population."

I often hear during the opening of a Qualified Trainer workshop, "I don't have that title! Or when did I become an SME?" to which I respond, "Congratulations! Your boss thinks highly enough of you as an SME to be nominated for QT." From that moment on, some people embrace the recommendation, while others are confused or outright resistant. Just because an SME has expertise does not mean they are willing to part with it. Many of them carry a host of issues inside their head, such as concern about job security; no incentive to become a Qualified OJT Trainer; lack of clarity about the QT role, training coordinator role, and QA Trainer role; more responsibility should mean more money; and the classic, "it's not in my job description."

Then what else is needed?

In their book, *Structured on the Job Training*, Ron Jacobs and Michael Jones list eight selection criteria for trainers to possess in order to be considered as an OJT Trainer. Notice that only two out of the eight focus on content or technical expertise.

- task knowledge and skills
- specialized training
- interpersonal skills
- literacy skills
- respect from others especially peers
- willingness to share
- concern for the organization
- (available bandwidth) job expectations that do not interfere with ability to deliver training.

1. Task Knowledge and Skills

Most importantly, trainers must posess the technical knowledge and expertise for the task at hand/subject matter. I call this being "Content Qualified."   You would be amazed, however, to discover what that documentation looks like upon an audit. . It needs to be the *documented* ability to perform the work behaviors and performance outcomes at the expected level of quality. When seniority is the only factor for nominating an SME, their paperwork is often the weakest. . In some cases, they are not even up to date with the most current procedure version! This is why "grandfathering" of SMEs,

especially senior SMEs, is frowned upon by external regulators. . All operators/machine technicians need to be qualified, including QTs.

2. Specialized Training

The completion of any specialized vendor training and/or educational program is a bonus. Certificates from technical schools document that the individual has knowledge and, in some cases, skills development. However, these certificates do not replace the knowledge and ability needed to perform the organization's specific equipment procedures; they complement it, instead. When in doubt, a review of the external course outline can be conducted to compare the content of each. If an equivalent train-the-trainer Certification course has been completed and deemed equivalent, "attendance credit" can be used, for example.

3. Interpersonal Skills

The ability to express complex ideas clearly and comprehensively during everyday interactions is paramount. You should ask if the SME:

- ❏ has the patience to "actively" listen to others?
- ❏ has the tendency to dominate conversations or is there a balanced two-way exchange that occurs?
- ❏ comes across as sincere, coherent, and rational in their way of presenting ideas?
- ❏ recognizes learners have unique learning needs?
- ❏ deliver a point efficiently and effectively or are they painfully slow with too much content?
- ❏ overly patronizes as an SME such that they shut down others from listening or engaging in a response?

4. Literacy Skills

The ability to speak and write in the company's official language is also critical. The SME as a QT needs to be understood. This may be stating the obvious, but I am constantly amazed when I see SME nominees sent to the workshop who can barely speak a full sentence. Just imagine your learners having to work twice as hard to understand what their QT is saying let alone grasp the technical concept. These people may be the most technical experts you have, but if they can't be understood when they explain procedural steps, then choose the next expert in your department who can express himself and be understood by all.

Today's documentation requirements have gone digital, and that means most QTs are required to use the company's learning management system (LMS). Your SME as a QT must have enough computer skills to be able to navigate through portals, LMSs, and document management databases to search, print, and in some instances, enter training data.

5. Respect from others

A good litmus test when selecting an OJT Trainer is to ask or suggest the nominee's name to a peer, supervisor, , or exemplar performers. Their reaction will most likely confirm your next step. QTs know what it takes to be an effective trainer. During the workshop, they often refer to the ineffective OJT Trainer with contempt.

You want an SME nominee to be perceived as having task expertise, leadership abilities, general problem solving skills, and some knowledge of other organizational systems. If you get objections, odd comments, or skeptical looks, reconsider your nominee choice. Often, if you send the nominee despite overwhelmingly positive feedback from peers, it will lead to undesirable results. You don't want the nominee to falsely believe that participating in the workshop and delivering a few OJT sessions will somehow evolve their credibility. Insteead, wait until you can create a developmental plan to build the skills and establish the person's credibility if you feel strongly that this SME has potential.

6. Willingness to Share

Good QTs are interested in the development of others and have the temperament that enables them to share their experiences and their "secret sauce" with their peers. Questions to ask yourself about your SME choice are:
- Just how cooperative has this SME been on other projects or when asked to reveal their "tricks of the trade?"
- Does this person want to be a Qualified Trainer?
- Does this person follow procedure changes well?

Some SMEs have such a solid foothold in their experiences and expertise bank that they have trouble adapting to changes in procedures and processes. If your procedures are frequently changing, and you are planning to use your QTs to deliver SOP revisions, they need to be flexible, adaptable and open to

accepting the "new way" the steps need to be executed. Otherwise, you run the risk of the revision training not transferring correctly.

7. Concern for the Organization

I am not advocating that QTs become cheerleaders for the organization. I am, however, suggesting that some level of "corporate citizenship" be established and then used as one of the selection criteria. "SME reluctance, avoidance, disappearance, evasion, and confusion are legion" in the training industry as noted by Allison Rossett in *Training Needs Assessment* .

When organizations set aside budget to revamp their train-the-trainer course and commit to enhancing their OJT program requirements as a result, there is also a renewed focus on the expectations of the QT . The SME as QT becomes a critical role for ensuring the long-term ability of the organization to sustain improvements. There's a lot riding on the success of qualifying SMEs as department trainers, so it makes sense to spend a moment to consider these additional factors when determining whether the identified SME has these additional attributes:

- ❑ Does this nominee work well within the team/group environment?

- ❑ Does the nominee generally exhibit a positive attitude about the organization and accept changes to procedures and processes well?

> "Only the people who actually perform the work that's being trained are true experts on it."
> Clay Carr, 1992, p. 52.

- ❑ Does the SME demonstrate values and behaviors that are in sync with the organization's mission and vision?

- ❑ Does the nominee bring up new ideas or ways to improve processes?

- ❑ Does the nominee have leadership capabilities or potential?

8. Available Bandwidth to be a QT

This last criterion is perhaps the most important of all, yet it is the most overlooked factor. It is by far the number one comment or complaint I hear from SMEs as QTs in the workshop. . Don't assume QTs will be readily and automatically available to deliver OJT and qualification events just because you sent them to the workshop. Have you considered their other job expectations that could interfere with their availability? What other special projects are they already committed to due to their technical expertise? Delivering structured OJT is just that — it's planned in advance, structured, and delivered using a

methodology that has been accepted by the organization. It requires focused attention to the learner, demonstrations by both the QT and learner, deliberate practice for mastery, and dedicated observation of the final qualifying performance demonstration. Is this SME available to do all that?

What were your expectations for QTs, anyway?

Without additional discussion and planning with the Training Department, most managers don't spend the needed time to reflect on how they are going to use their QTs. Even with the listed criteria and explanations provided on a QT form, some managers rush through this qualifying phase and insist on sending who they've "justified." The following is a list of planning questions to ponder:

- ❑ Dedicated or shared?
- ❑ Training as the only responsibility or only when needed?
- ❑ Nonexempt SMEs:
    - o Technicians, Operators, hourly employees?
- ❑ Exempt SMEs:
    - o Supervisors, Engineers, Other "Professional" Staff?
- ❑ Classroom Training and Facilitation responsibilities as well?
- ❑ Conducting Employee Qualification Program as well?
- ❑ Developing content and/or OJT training guides?

Here's what happens when Supervisors are sent to a QT Workshop

At some point in the workshop, a nominated QT who is also a supervisor will realize that they are not the true expert. Many confess that they are not a "pure" SME during breaks and lunch. This realization typically happens during the discussion around planned OJT methodology and definitely by the time we discuss conducting Q events.

"Only the people who actually perform the work that's being trained are true experts on it. If you want training that really improves performance, it has to be designed around the real-world skills of your best performers", says Clay Carr. Despite the efforts of the Learning & Development Group / QA Training Department to convince managers otherwise, the supervisors now realize that they need to send "their" folks to the next set of classes. . Waste of time? Maybe.   But at least they now have an appreciation for the required criteria. An executive briefing session would have been more appropriate. Somehow "I told you so" would fall on deaf ears anyway.

Summary

The next time an email is sent asking for nominees to attend a QT workshop and the requestor is providing a form, nomination criteria, and a schedule of sessions, you might want to spend a moment to refresh with this article. The role of the SME as a QT is one of the most important functions an organization has to sustain the training quality system. Recall that it takes additional attributes such as interpersonal and literacy skills and respect from peers to be an effective trainer as well as technical expertise. If you invest the time to qualify this SME to become a QT, will that person have the bandwidth to meet your performance expectations?

References

Carr C. Smart training: the Manager's guide to training for improved performance. New York: McGraw-Hill; 1992.

Hodell, C. SMEs From the Ground Up: a no-nonsense approach to trainer-expert collaboration. Alexandria: VA, ASTD Press; 2013.

Jacobs, RL and Jones, MJ. Structured on-the-job training: Unleashing employee expertise in the workplace. San Francisco: Berrett-Koehler; 1995.

Rossett, A. Training Needs Assessment. Englewood Cliffs: Educational Technology Publications; 1987.