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Learning, Motivation and Total Quality: The Potential of Correspondence Training

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Introduction

Skills training, as part of a company's evolution to total quality management (TQM), is conducted most effectively away from the distractions of daily job responsibilities. However, despite the admonishment of respected experts like Tom Peters[1], cost-conscious corporate management is asking its employees to assume more personal responsibility for a company's evaluation to total quality, and do it with fewer resources. Off-site seminar or classroom settings are the traditionally favoured learning environments. But high costs limit the use of seminars or classrooms for training. Correspondence training offers an effective, low cost approach for employees to learn new skills and to reinforce skills introduced with seminar training. Companies could consider it as an inexpensive insurance policy to assure progression towards total quality objectives.

Rapid technological change has forced an evolution both in the nature of work and in how people are prepared for that work. Nothing is getting simpler, there is a continuous growth in the amount of information that one needs to know to do one's job effectively. Conversely, if the job is simple (translation: low paying) such as a production line job, to be more valuable to the employer and make more money it's necessary to learn the skills of several jobs and make rapid transitions from one to the other[2]. Greater job demands call for increased training, but corporations are looking to slim down by reducing the resources committed to such traditional headquarters functions such as training. The conclusion: individuals must take more responsibility for their own career development.

Correspondence training methodologies offer corporations a means to widen their training resources. They can guide the individual in studying a new subject or skills area without the requirement of a classroom. We explore the evolution of this approach, the use of the testing process as a research guide and how company-sponsored, motivational approaches to correspondence training can result in high completion rates, reduced training costs and improved productivity. Until now, corporate sales training, especially in the automotive industry, has been a prime beneficiary of this correspondence training approach. However,

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two prominent trends; corporate decentralization of the training function and certification of competence in non-professional areas such as sales, suggest a broadening of correspondence training applications.

Corporate Training Trends

Corporate training has traditionally modelled itself on the classroom approach: a group of individuals gathered in a classroom led by an expert in a specific subject. Using a combination of source materials, workbooks and lectures, the teacher attempts to help the students achieve an understanding of the important points of the subject and how it relates to his or her specific job responsibilities. To measure retention and to reinforce the message, some courses include periodic exams or quizzes administered in the classroom. At the conclusion of the course, a grade or "certification" becomes a record of successful completion. This is an old methodology familiar to us since our days in elementary school.

Today's rapidly evolving corporate environment has increased the need for training as it has reduced the resources available for that purpose. The following trends reflect this changing environment:

- (1) Reduction of training expenses by upper management has become standard office practice for the 1990s[3]. In particular, management is taking a hard look at continuing the use of full-time training staff. Use of full-time training staff can be expensive when one includes salaries, fringe benefits, equipment, floor space, heat, rent, electricity, supplies, and external services into the cost calculations. If one uses, as a rule-of-thumb, that the average professional employee (trainer) costs about three times his or her annual salary[4] and averages about 240 working days a year, that \$40,000 to \$80,000 employee is costing the corporation from \$500 to \$1,000 a day. That is about what it would take to hire a part-time consultant. Without a justification verifying the impact of training on corporate productivity, staff members are cut and their functions replaced by outside consultants or discontinued altogether.
- (2) Functional staff work that was traditionally done at headquarters is being shifted to the front lines "where the real work gets done"[5]. Front-line managers are assuming responsibility for an ever-growing share of functions like training, marketing and accounting. New technology, in particular, the personal computer, have made this trend possible. However, in practical terms, front line employees need training to handle these extra chores and the motivation to do them properly.
- (3) Voluminous literature on products, service procedures, warranties and liabilities, customer differentiation etc. adds to the employee's personal information explosion. This literature, written in different styles and for a variety of purposes, is often not easy to comprehend. (For

multinational employees the situation may be even more daunting because of poor English translations[6].) The sheer quantity of information is overwhelming. Rather than attempting to master all of it, the employee will look for the easiest sources, usually advertising literature, and try to make do.

- (4) Field management is reluctant to commit personnel to extend seminar-type training. Some of this reluctance may be attributed to high staff turnover and cynicism about investing in training and preparing the sales person for his next job with the competition. Entry-level sales training at third party distribution channels (automotive or electronic distributors) or home-based direct sales (insurance or cosmetics) may consist of little more than a packet of information and a hearty handshake. It is sink or swim in this survival of the fittest environment. Managers resist pulling staff out of the field for training because of job time lost and travel and daily expenses.

Self Study Alternatives to Seminar Training

Self directed training and correspondence training are used as substitutes for and as reinforcement to traditional seminar training. At Steelcase's Self-Directed Learning Centre[7] trainees self-assess their training needs and schedule themselves, using electronic mail, for the centre's course ware materials. The centre's workstations contain videotapes, audiotapes, interactive video disks, computer based training materials and traditional workbooks. By scheduling the training to coincide with a trip to headquarters, there is less need to pull the employee out of the field for training.

It was lost work time for installation contractors and field managers that prompted instructors at the University of Wisconsin to repackage a successful four day tank-system installation training course into a 20-lesson self-study format[8]. Although more than 1,300 people had completed the training, the instructors found that many more could not participate, not because of the seminar cost (\$875), or the cost of transport and expenses, but because these owners and managers of small businesses could simply not be away from their jobs for an extended time.

Automotive salespeople are among the most reluctant to sacrifice selling time for training. Each potential sale missed means lost commissions. Automotive manufacturers have created product-correspondence courses incorporating video tapes and workbooks to bring salespeople up to date on new models and model year changes. Since many automotive dealerships sells cars from different manufacturers, manufacturers may offer incentives to assure that sales people complete the training on their models. Competence is measured by a test at the end of the programme or by several quizzes throughout its duration.

The automobile industry is also attempting to improve the professional image of the car salesperson. The National Automotive Dealers Association has initiated

a certification programme that combines home study with training seminars. Its curriculum includes ethical practices, selling techniques and customer relations. Approximately 2,500 of the 150,000 car salespeople have enrolled[9]. Apparently some dealership owners are unwilling to enrol their salespeople in the programme. They fear that the certification credentials will become a ticket to a job at another dealership.

Professional salesperson certification is growing in popularity. The Sales and Marketing Executives of Greater New York recently approved development of a national sales certification programme. The programme will require college course work and the successful completion of a one-day test. They claim that it will enhance the image of the salesperson by following a trend towards certification already established in the financial and accounting industries.

The Certified Life Underwriter (CLU) and Certified Financial Planner (CFP) certification programmes are well established. The North American Securities Administrators Association, which regulates mutual funds and the National Association of Securities Dealers, is beginning certification programmes. Each has set up a committee to investigate mutual funds sales practices. These committees will investigate the qualifications of the people who sell shares and whether they are sufficiently up to date with today's complex products and services. Formal, industry-wide continuing education may be needed[10]. As with most certification programmes, the curriculum will involve home study and testing.

A review compiled by Diehl[11] found that home study had had a slow, steady growth in acceptance worldwide. While the slowness may be attributable to "institutionalized inertia by traditional educators... factors such as the re-examination of traditional educational methods, concerns over increasing costs, and recognition of the need for the education and training of persons living in areas that are remote from school and campus sites and for people who have already entered the workforce, who have made home study more attractive as an educational option. Educators, government and military leaders, and business managers are coming to appreciate the flexibility, adaptability, effectiveness and economy afforded by home study". The most flexible, effective and economical way of creating a home study curriculum is to use testing as the training vehicle. The test becomes a comprehensive research guide for mastering existing source materials.

Testing as Training

Testing as an integral part of a home study curriculum has a completely different impact than that alluded to by Frank Smith in *Insult to Intelligence: The Bureaucratic Invasion of Our Classrooms*; "The myth is that learning can be guaranteed if instruction is delivered systematically, one small piece at a time, with frequent tests to ensure that students and teachers stay on track... Nobody learns anything, or teaches anything, by being submitted to such a regimen of disjointed, purposeless, confusing, tedious activities. Teachers burn out, pupils

fall by the wayside, and parents and administrators worry about the lack of...progress...or interest"[12]. At best, Smith sees testing as a measure of knowledge and an enforcer of discipline. More frequently testing becomes a numerical camouflage for a failed educational system punishing those who can't play the game. The objective of testing in home study is to create a game-like environment bringing excitement to learning in one's own time[13].

A home study quiz is not testing as practiced in school. There are no proctors to look over the participant's shoulder. No buzzer will signal that the time is up. There is no browbeating, no humiliation for getting a wrong answer. Perfectionists have as much time as needed to check and recheck answers. The underlying message is that a good score will probably translate into improved job performance. Testing has evolved into an integral part of a positive, learning reinforcement experience.

The home study quiz can be considered a research guide to the foundation material of the correspondence training course. These foundation materials may include a varied assortment of seemingly unrelated literature and training materials. These materials are bound together by one common element; each has some information to contribute to the achievement of the objectives of the course. The quiz can be considered a "treasure map" leading to buried information nuggets. Of course, this "map" is not completely clear. It doesn't tell you exactly where to find the information, only where to look. While searching for the specified information to answer the question, the participant becomes acquainted with a broader part of the foundation materials. The process of the search will unearth other valuable information "nuggets" that contribute to confidence and job performance.

Question development also distinguishes the home study quiz from its classroom counterpart. The classroom variety quiz is an educationally neutral device. It measures the knowledge of the participant, but it does not add to existing information on the subject. For a home study correspondence course, developed to provide all information on a subject, the classroom type quiz is adequate.

When a home study course is constructed for a dynamic, rapidly changing subject area where information is never constant or complete, the information-rich question becomes an integral part of the course. In industries where change is rapid and unpredictable, existing information can become inadequate overnight. To avoid obsolescence, a course must evolve with its subject. This course may include foundation materials, such as industry history and basic sales techniques, that stay constant. It will also refer to continuously changing information on new products and the competition. This information may be maintained on-line or updated by memo. The glue connecting these disparate information sources into a focused correspondence course is the information-rich question. Filling the information gaps in the source materials, it highlights the value in that material to the participant. The questions evolve with their sources. The process of question obsolescence and regeneration is continuous.

Course Evolution from Information Sharing

Dynamic course development cannot depend on the developers alone. Participants must help to keep developers up to date on current activities. Developers must be willing to accept their input and make the necessary changes. Field testing of questions can identify some problems with currency of information before publication. Field testing is only one technique, not a comprehensive solution. Another technique, reactive in nature, is spotting missed question patterns as an indication of changed field conditions. To be truly effective, developers must encourage user participation as an integral part of course evolution.

The telephone and the fax machine provide a live link between the real world of the test taker and the document world of the test writer. A successful course developer admits that the documented world is not the real world. The test taker is encouraged to become a collaborator in the course creation process. He or she identifies erroneous data by submitting evidence of what is really happening.

Open-ended essay style, "How would you do this?", questions for bonus points serve to help the participant think through how he can apply the course information to his job. Responses provide clues to the developer on the use of course information in the field. From a broader perspective, essay type questions can serve as vehicles for field intelligence gathering[14].

The information gathered through the essay-style questions must not ride a one-way street. Sharing the best or most creative responses with other participants by means of a newsletter adds value and legitimacy to the course. Learning from one's peers is always preferable to hearing the same message from a staff expert from headquarters or an outside consultant.

A legitimate field feedback system can overturn commonly accepted headquarters assumptions about the field. For example, headquarters personnel of a major lighting company expected little response to an essay question about utility marketing programmes. "They just don't do utilities" was the refrain. A flood of responses suggested the contrary. Tom Peters claims that headquarters experts are too often a drag on action. They have too little time for learning new techniques because too much time must be spent on coping with the bureaucracy[15, pp. 441]. Dynamic feedback mechanisms offered by motivation-driven, correspondence training programmes can help bring headquarters staff up-to-date with new field skills and techniques. It also has potential for measuring acceptance of TQM in the field.

Correspondence Training Achievement through Motivation

Motivation in corporate learning, especially in a sales environment, straddles a fine line between being extrinsic (incentives and rewards) motivation and intrinsic (recognition and desire for self-improvement) motivation. Saying that participants get to keep their jobs is missing the point. Learning is much more effective when one wants to learn, rather than when one has to participate.

“Extrinsic motivational orientations are preferable to intrinsic motivational orientations when the individual’s initial intrinsic motivation is quite low. Rewards can make an otherwise uninteresting task, worth pursuing”[15]. Home study of product literature and procedural manuals fall into the category of “uninteresting tasks”. (How much of total quality management could be categorized as “uninteresting tasks?”) The individual knows that a better understanding of products and procedures will make him or her more productive. The reality of the home environment is that there are many other activities (time with family, entertainment, hobbies) with more immediate intrinsic rewards.

Extrinsic motivation is an integral part of most sales environments. A large part of compensation, if not all of it, is commission based. A direct relationship exists between income and sales. Bonuses are often structured exclusively as rewards for sales performance. Incentives regularly entice third party salespeople who work for distributors or retailers. These incentives are tangible rewards, cash and non-cash, beyond commissions, which the salesperson would normally earn for the sales of that product. These incentives may be immediate (sell one, get one) or, more likely, cumulative. Cumulative incentives add up points as sales are made. These points are cashed in for catalogue-type awards or for incentive travel. Salespeople are familiar with these types of incentives. Similar awards can motivate people to learn how to sell a products effectively.

To maintain the motivation necessary to complete a multi-part correspondence training programme, a mixture of intrinsic and extrinsic motivational factors is required. Extrinsic motivators catch the attention of the participants and get them to take that critical first step to learn about the programme. A branch manager of a major New York City bank described the situation in her bank:

Our bank is more committed than most to teller training and recognition. But it’s very difficult to interest tellers in doing anything more than their jobs. They won’t even read the literature about the programs we offer. For instance we have a “Service Bar” program where the top scoring teller wins \$5,000. I make a special point of getting tellers together in a meeting and discussing the program details. Getting them to see that other people have won this award helps get them involved. Without my taking an interest and pushing the program, it would never get off the ground[16].

Extrinsic motivators create the excitement necessary to get started, intrinsic motivation keeps up the momentum. It is part of the shift from the incentive mentality to the learning mentality. It is not enough to know there is a pot of gold at the end of the programme. The professional sales person needs to believe that the effort of participation has other, intrinsic payoffs. Most important is the belief that there will be value added to the job, that job performance will increase because of participation. Purely incentive-driven correspondence training programmes will lose participation as participants realize that they are no longer in the running for the big prizes and drop out. Publication of individual scores as part of a total ranking can rekindle the competitive spirit. Participants

will complete the course to avoid being shown up. Certification, even if it has little value other than to put a code on a training event, has proven it can motivate continued participation.

Corporate correspondence training programmes can encourage team participation. To bring an entire organization quickly up to date on a certain subject, such as total quality, teams awards, besides individual awards, create the necessary excitement. Getting field managers voluntarily to "buy in" to the course is the challenge. Convince them and they will convince their subordinates to participate. The more enlightened see the home study testing process as a tool to help meet their increased training responsibilities. It becomes a fun way for teams to participate in group study.

The surest way to guarantee programme success is by publicizing the support of the highest levels of the sponsoring organization. Nothing works better than the knowledge that the president is monitoring the progress of the programme. An award ceremony dinner with the top scorers further shows top management's commitment.

Challenges to Correspondence Training

Correspondence training, like total quality management, works only for those who take the process seriously and are willing to invest the time. Some may wish to avoid doing the work and still give the appearance of course participation. They will try to get the answers from someone else. Missed answer pattern analysis easily identifies those seeking a shortcut. A little subtle publicity will usually stop it.

Using course participation results as a punitive measure to rid the organization of nonconformists and below par performers undermines morale and defeats the purpose of this type of training. Including a too diverse population in the same course will intimidate the less knowledgeable and be unattractive to more experienced participants. A compromise, middle-of-the-road course, not too difficult for entry level nor too simple for advanced participants will satisfy nobody. Neither group will be anxious to participate again. Better to create two courses than to try to cram a large, disparate population into one.

The Future of Correspondence Training

Well-established trends support the continued growth of corporate correspondence training. These trends are unlikely to change significantly in the future. Sophisticated delivery mechanisms, such as interactive CD-ROM technology, will become more prevalent. Courses will be delivered via two way cable TV. Remote computer centres will facilitate more extensive certification testing.

Yet, for the bulk of these courses, paper and pencil will continue to be the preferred medium for participation. Their development costs are limited and require no investment in fancy technology. People are comfortable with print media and are more likely to take it seriously. The instructors who created

the self study tank installation course chose print over video tapes to convey the information. They believed that most people watch instructional tapes much in the same way that they watch television, with less than full attention[17].

The evolution of the corporation continues unabated. Total quality management, or one of its many incarnations, remains a goal. Even without internally mandated change, increased federal regulations in areas such as energy conservation, OSHA requirements and environmental regulations will require additional training. Given corporate reluctance to invest in training staff, correspondence type courses may become the training delivery system of choice.

With governments trying to mandate change, corporations trying to profit from it and individuals trying to survive it, the possibilities for applications of correspondence training will grow enormously in the coming years.

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