TRAINING
MANAGEMENT

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RelyOn Nutec
360° Safety

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TRAINING MANAGEMENT AT A GLANCE

For companies operating in safety critical environments, a key element of keeping a workplace safe is ensuring that personnel are skilled and competent. This includes training staff in necessary safety protocols and standards by way of courses and training on the job throughout the year. Furthermore, for these safety critical companies, it is also a **must** to be able to demonstrate regulatory and corporate compliance of employees by having valid certification in place.

As the world's leading provider of safety training to safety critical industries, RelyOn Nutec has been part of solving training and compliance challenges for decades, so we understand the issues you may face. Customers often share their frustrations with us around coordinating training and maintaining compliance with a constantly changing workforce, considering the involvement of multiple stakeholders and working with numerous data sources.

Luckily, there has been a push across industries towards greater operational efficiency and transparency, which has resulted in companies implementing automated systems to help increase efficiency or, better yet, completely outsource non-core tasks. In combination with such overarching trends in digital transformation, we believe that training management tools and services will be essential for companies operating in safety critical industries from now on.

CHALLENGES IN TRAINING MANAGEMENT

To comply with internal and external requirements and regulations, most companies have a designated training management function. This is typically a dedicated department or person that manages the Learning & Development (L&D) process and coordinates the different training activities by reviewing the large training matrices, usually stored in excel. The planning and management of training can be a very time-consuming process. Consider the number of training bookings required across an organisation, the changes to training requests, and the subsequent record keeping. It all amounts to a lot of administration time spent updating spreadsheets. This approach only increases in complexity over time. Add to that the myriad of differing training matrices often scattered across the organisation and stored on multiple systems, and you have a recipe for organisational mayhem.

The process described below is an excellent example of why clients turn to us for help.

- **PROCESS:** Using excel spreadsheets to track training status. Processing manual bookings through email and phone calls with multiple providers. Contacting employees individually to provide information about planned training. Receiving, confirming and storing certificates after training is completed. Manually filing documents for auditing purposes.

This level of sophistication is where most companies start when they realise the problems they are facing – and unfortunately, they will stay at this level longer than they would like to admit. It could work for smaller organisations, but challenges arise in various parts of the training and compliance process as the workforce grows to a certain size and complexity.

CHALLENGES

- **LACK OF OVERVIEW IN ADMINISTRATION OF COURSE BOOKINGS AND CERTIFICATIONS.** Having multiple systems to work in and multiple copies of spreadsheets throughout different locations creates an unsurmountable task. For instance, different training matrices are used per company function, which all have to be managed and updated to provide management with the necessary information.

- **LACK OF FINANCIAL OVERVIEW.** Without a central overview of cost and spending, it is difficult to keep track of L&D budgets. Moreover, estimating next year or next month's training spending becomes even more complicated when considering refresher course intervals.

- **IMPOSSIBLE TO TRACK OPERATIONAL COMPLIANCE.** Major ERP systems cannot store evidence or certification proof of (sub)contractors. But also, for your staff and organisation, it can be tiresome to maintain endless spreadsheets of compliance for all blue-collar functions and the large variety of certificates required for each.

- **NO VISIBLE AUDIT TRAIL.** Without a centralised system managing all aspects of the training requests and expenses, approvals are spread out between emails, written and verbal communication which complicates audits tremendously. Just think of the number of internal approvals for various training spends and changes to bookings and confirmations, including travel and/or lodging arrangements.

- **MINIMAL ENGAGEMENT FROM STAFF THROUGH LIMITED INSIGHTS.** In a challenging work environment, managing compliance is the last thing you would want to think about. Engaging employees by giving them a simple compliance overview will help them take appropriate actions in due time.

ONE SOLUTION
TO RULE THEM ALL

The solution best suited for companies with a high degree of training management complexity and workload is to use a training management software solution. However, multiple operating models could be worth considering, which we will expand on later.

A software solution makes all training management data readily available and allows the company to scale its training efforts through system automation, increasing efficiency and improving the overview of training needs by centralising data to create a "single source of truth". Meanwhile, the ability to produce reports and see an overview of spending at the click of a button will allow you to control budgets and estimate future training costs.

A proper software solution should be:

• Fit-for-purpose – meet your company-specific and industry-specific needs for training management
• Fool-proof – the system should be designed to eliminate human error
• Modular – only use and pay for the functionality that applies to your needs
• Intuitive – easy to use for all user levels
• Flexible – adaptable to new requirements
• Automatic – able to automate as many repeatable tasks as possible
• Audit proof – keep track and store all certificates with an auditable activity log.

When taking action and moving towards implementation, a structured approach needs to be applied. We advise kicking off an implementation project by conducting a "Needs Analysis Workshop" to identify the customer's most important solution requirements, such as:

• Compliance SLAs to abide by per function
• Relevant regulatory bodies and audits to consider
• Roles and workgroups to be set up in the system for access rights
• KPIs and reports required
• Budgets of total training costs and forecasts to incorporate
• Existing certificate management data and proof to import
• Communication preferences inside & outside the system
• Number of preferred training providers expected to be used
• And so on …

As you can see, no system implementation should be taken lightly, but with the proper guidance and engagement from stakeholders, you can succeed in creating a clear picture of the requirements and approach needed. These should be combined into a concise and straightforward implementation plan, which can be used as guidelines by both the implementation and the internal engagement teams.

The following steps that could be considered would be configuration, data import, pilot testing, user training and roll-out.

PITFALLS

When introducing new ways of working and changing the daily work processes, there is always a risk of project failure if it is not professionally managed. But with good planning and by partnering up with an experienced service provider, risks can be mitigated and the project successfully completed. In our experience, we see three significant pitfalls when implementing a digital training management system.

- **INCONCLUSIVE AND VAGUE OBJECTIVES:** When working on sizeable, complex software projects, it can be difficult to envisage a future system. Even with an agile implementation approach, all parties involved should still agree to a functional scope that describes the system's abilities upon delivery.

- **UNCLEAR DATA MIGRATION STRATEGY:** A classic mistake is underestimating the workload that comes with data migration and, therefore, the resources needed to gather and transfer the data to the new solution successfully. Considering that standardisation following data cleansing is one of the main benefits of software implementation, this should be a top priority. Make sure that this is a crucial step when aligning on an implementation approach.

- **LACK OF SCOPE MANAGEMENT DURING IMPLEMENTATION:** Any implementation is prone to scope changes as data is provided and new stakeholders get involved. Scope changes will always impact the execution and timeline. To avoid disagreements between parties, ensure to track and describe all scope changes in a separate document accessible to all relevant stakeholders.

EXPECTED BENEFITS

Although any system implementation will have its specific benefits tailored to the customer's challenges, the main benefits that can be expected from a training management system implementation are:

- A simplified and structured planning and booking process, making it easier for the L&D department to coordinate training with operations and HSE.
- Being able to easily create an overview of all certifications per function, immediately clarifying the compliance level of the workforce, to pinpoint where action is needed.
- Creating a better overview of upcoming and planned training and its status (requested, planned, confirmed, paid etc.).
- A profile page for each staff member to get engaged with their training needs, involving them in the process of staying compliant or even making them responsible for tracking their compliance and taking action to plan courses.
- One central place where certificates can be uploaded or linked, using it as a repository to show auditors that you are certified and competent to get the job done.
- The ability to link e-learning courses directly to the training management solutions and automatically generate certificates.
- Complete cost overview and budget reports with forecasts to track your spending and estimate future costs.

TRAINING MANAGEMENT SERVICES (TMS): THE OPERATING MODEL OF THE FUTURE

As companies continuously look to increase efficiency and reduce costs, more companies have turned to outsourcing as the future operating model. Outsourcing all of your training management needs to a service provider – known as Training Management Services, or TMS provides numerous benefits. Outsourcing non-core activities have become an increasingly popular strategy to create focus and drive efficiency and cost reductions across an organisation, as you typically only pay for what you need in resources. It is beneficial in industries prone to rapid changes in their operational activity or for companies that operate in a safety critical environment. In addition, it also adds to your company's flexibility and scalability, as you don't have a static internal workforce to depend on.

Training Management Services means that your supplier will do all the planning, booking and administration of your training and HR compliance for you. This means that they operate the training management solution for the customer and essentially relieve you of the entire training management function utilising their specialised training and booking staff. Typically, they will be a training provider themselves that can already provide a substantial percentage of necessary training in-house and book additional training which is not offered in-house at your preferred suppliers of choice. The TMS partner will update the training management solution and regularly deliver requested reports, which can be discussed thoroughly during performance review meetings.

Although this model is still relatively new and unknown in Europe, it is a common model in North America, with 45% of companies already outsourcing their entire L&D need. They recognise that the variety of training needs across an organisation is too specialised to be the responsibility of general staff.

HOW TO MOVE TO A TMS MODEL?

Outsourcing is not to be taken lightly, as you are putting your faith in the successful execution of one of your business processes in the hands of an external party. However, if a robust selection process is applied, you should find a trustworthy, knowledgeable, and strategic partner that you can trust with such a responsibility. We chose the word "Partner" carefully here because you need to work together and trust one another more than your typical client/vendor relationship.

Here are some guidelines of what to look for in a TMS provider:

- Experience – they should have a proven track record of successful outsourcing of Training Management Services.
- Customer focus – they should have an excellent understanding of customer needs as well as outstanding customer service.
- Availability – They must be capable of hosting a substantial number of training internally and have a network of 3rd party providers, to accommodate last-minute client requests.
- Transparency – They must communicate through your training management solution to ensure that you are constantly updated and informed.
- Cost-effective – Ensure that they provide the same level of service as an internal department at a lower cost than currently paid.
- Flexible – Finally, they should be flexible and able to meet last-minute requests and solve unexpected challenges.

After your partner selection, it is crucial to define your training management outsourcing requirements and consider nurturing your partnership.
Think of the following:

• Responsibility matrix of various involved stakeholders on both sides of the aisle
• Performance review methodology and schedule
• A realistic Service Level Agreement with KPIs, taking a ramp-up period for service delivery into consideration.

TMS BENEFITS

However difficult to quantify, there are a lot of qualitative benefits and improvements to be expected when working with a TMS partner. The most vital ones are listed below.

• Cost reductions – Only pay for what you need, turning your fixed costs (staff) into variable costs per training.
• Mitigate risks – Leverage your partner to keep track of regulatory changes, always ensuring compliance and protecting your organisation from liabilities.
• Scalability – Easily scale up or down through your partner's workforce without having to consider hiring additional staff internally.
• Skill access – Your partnership provides access to talent, technology and specific expertise that would otherwise remain inaccessible, such as educational or tuitional expertise.
• Business focus – Being able to focus on your core business without worrying about side activities, however valuable they may be.

TRAINING MANAGEMENT:
TWO OPTIONS, ONE SOLUTION

This article has demonstrated the value of an integrated approach to training management, dramatically increasing the efficiency with a tailored solution. However, implementing the solution and operating it yourself or fully outsourcing your company's whole training management function depends on many things. We have summarised the main benefits for both.

SOLUTION 1: AN IMPLEMENTED TRAINING MANAGEMENT SOLUTION, OPERATED IN-HOUSE

• Having a well-functioning L&D department that can keep detailed knowledge about your workforce's training inhouse
• Desire to maintain firm control and oversight with the training management and associated costs
• Having your internal resources operate and maintain a sophisticated IT solution

SOLUTION 2: AN OUTSOURCED TRAINING MANAGEMENT SERVICE PARTNER

• Create strategic focus on core business while outsourcing non-core activities
• Preferring flexibility and scalability over control and responsibility
• Being able to trust an external partner with a critical business function

If you find it difficult to reach a conclusion for an approach, our solution consultants are more than willing to discuss which option would be best for your business. In the end, it all comes down to the ability of your current L&D function and the strategic vision you have for the future. Do you already have a dedicated L&D function in place? Do they have the skills and ability to manage a training management solution? How important is the L&D function for your company's core business? What do you want to achieve with this project?

We can happily enter into conversations with you to sketch out the details and plan the next steps. Because whichever option you choose, RelyOn Nutec would be proud to be your partner in training management.

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