

Grow Small Business In Your Branches

6 Training Implementation Strategies That Work

*The strategies described in the article correspond with the first rating scale on our **Small Business Readiness Checklist for Training—Define Training Implementation Strategy**. Use the checklist side-by-side with the article to assess opportunities to boost training's impact on small business results.*

If your bank wants to grow small business by penetrating the existing branch relationships you want to keep, the first and most important step is to **define the implementation strategy**. The biggest challenge is engaging managers to coach and lead change. Eighty-seven percent of training impact is lost within a month unless trainees' managers begin coaching immediately.

Frequently, training department teams must do the work that line managers should do to focus and lead managers through an organized roll out of new sales initiatives and training that supports them.

Six steps to engage business leaders and increase the impact of training and bank results:

1. **Business Outcomes** : Helping your line-of-business partners describe the specific results they want to attain and designing training initiatives around achieving those. Press beyond the obvious (sales results) to identify other outcomes that may be important (e.g. retention, coverage of a particular target segment, customer satisfaction ratings).
2. **Expectations** : Translating business outcomes into specific expectations for branch staff and small business banker performance (e.g. "We want to move our products cross-sold at account opening for new business accounts from two to six, and we want that change to occur in the next 180 days"). In addition, setting specific expectations for sales managers to observe and coach sales activity.
3. **Measurements** : Asking your line-of-business partners how they will measure impact and outcomes and helping them develop a tracking framework for those metrics. Go deeper: standard bank reports do not track the "leading indicators" of sales success (e.g. behavior frequency, behavior quality, and steps moved forward in a sales process). Urge senior managers to sponsor efforts to track leading indicators, even if this must be done manually for six months. Use the metrics to calculate training's ROI.
4. **Feedback** : Determining how you will let branch staff know how well they're tracking toward goal.
5. **Conversation Framework** : Guiding managers through a process for communicating with staff pre-training and post-training so that they are clear on results, measurements, expectations, and feedback mechanisms.
6. **Coaching Visibility** : Establishing a tracking and reporting method that will enable senior leaders to see who is coaching and to tie banker performance to coaching activity.

Clarity's experience shows that 10% of the impact of training is the design of the curriculum itself and 90% is how well it's implemented. Defining results and how they'll be measured, setting clear expectations for branch staff on how to achieve them, explaining how training is going to help them move toward the goals, and discussing the activities they will perform should all occur before any training takes place.

You'll save time and money *and* position your small business initiative for success.