

## Training as an Effective Countermeasure to Performance Gaps with Jeff Welch | 079

Welcome to Lean Leadership for Ops Managers, the podcast for leaders in Ops Management who want to spark improvement, foster engagement, and boost problem solving - AND still get their day job done. Here's your host, Leadership Trainer, Lean Enthusiast, and Spy Thriller Junkie, Jamie V. Parker.

When do performance gaps indicate that training is an appropriate countermeasure? And how do you decide between in-person versus virtual training instructor-led versus on your own self-paced?

Well, welcome back to our Q1 Executive Series, and today our series takes a bit of a twist as we actually are talking with a learning and development executive instead of an operations executive. Now our guest today is Jeff Welch. And Jeff is an accomplished corporate trainer, leadership coach, and public speaker with more than 20 years of experience in the learning and development space.

And as President of GW Training Events, Jeff specializes in facilitating instructor-led and virtual training courses, which really focus on professional development, skills, and training the trainer programming so that organizations can, of course, solve their most pressing problems. All right, so we've got a little bit of a twist today. I think you'll enjoy it. Let's dive in.

**Jamie:** [00:01:36] Jeff, welcome to the show today.

**Jeff:** [00:01:38] Thank you. It's an honor to be here.

**Jamie:** [00:01:41] Well, I am excited to talk about learning and development, but before we do that, let's get to know you a little bit. When the executive series, the first question that I always ask and I want to ask you as well is just to share a value or a mantra or principle, something that really kind of embodies your beliefs about leadership.

**Jeff:** [00:02:01] Sure. I think it's summed up in what I feel is a pretty nifty quote here. And it was a quote by former President US President John F. Kennedy, which says "Leadership and learning are indispensable to each other." And that is just sort of a mantra that I like to live by because it encompasses what my area of expertise is, which is learning and development.

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And that's also a factor of leadership because I do think that as leaders, we don't know everything. So it's always good to be on that sort of continual path of learning and development. And that's where I come in as an LED professional. So that would be kind of one of my mantras or quotes that I like to live by.

**Jamie:** [00:02:43] Yeah, I love that and I agree. I think it's so important. It's kind of this leadership is this lifelong journey, just as learning is this lifelong journey and they go hand in hand, for sure.

**Jeff:** [00:02:52] Absolutely.

**Jamie:** [00:02:52] Awesome. Well, so today we are talking about learning and development, and that's your area of expertise. So just give us that kind of that quick background and experience that that you're kind of coming to this conversation with.

**Jeff:** [00:03:04] Sure. Yeah. So I guess it is the area of expertise. I don't want to come across as pompous, though, but I've been I've been around for a few years in this. Let's see. Started back in 1996 at the Atlanta Journal-Constitution, the major daily newspaper here in Atlanta. So I started in the learning and development department. To be quite honest with you, I wasn't all that great. I did have some experience in like the field in which I was training the industry, per say.

And I guess because I had some communication skills, I sort of looked at or I was viewed as an ideal candidate to go into training and I took the job and it's where I cut my teeth. But like I said, there was always room to grow.

So I actually began to attend some train to training workshops by a company called Langeveldt Learning Services there out of Ottawa, Ontario, Canada. And that's where I began to improve and learn new aspects of the field. But every time I went to a Landrum course, I started kind of thinking to myself that looks like a cool job.

And in the year 2000, they picked me up. So from 2000 to 2020, I traveled around the United States, Canada, Europe, the Caribbean. Anywhere they needed a company or an organization needed one of us

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to come in and do one of these Train the Trainer programs. I did that with them, so I learned from the best. I taught some of the best. I hope to impart that skill and knowledge that I've gotten over the years.

**Jamie:** [00:04:27] Well, great. Well, let's jump into the conversation today. And you know, let's just be real, right? So, for an organization to be competitive today in today's employment market, you know, just paying a competitive wage that's that's not going to cut it. That's not enough. And people have more choice in employment. And like I think one of the big differences now is that they're more aware of the choices they have, right?

So it's not this assumption that I'm just stuck where I am. And so through this executive series at different points, we've talked about attracting and retaining great people and becoming an employer of choice. And I think that part of being an employer of choice is providing development and growth for team members.

So when I say, you know, training, of course, you know, that can come up and mean a lot of things to a lot of different people. But let's just start there. You know, what is training or this learning development? What does this really mean to you?

**Jeff:** [00:05:23] Sure. If I can just add to what you said, though, before we get into the L and D part of it, let's do it. You are really spot on with something, you know, with the workforce the way it is now, people aren't demanding a little bit more than, like you said, just a decent paycheck, demanding just a little bit more than decent benefits.

They want to know that that company has their back in regard to growth and learning and development. How this organization moves through the world, giving back with diversity and inclusion and being eco friendly. So, you know, there's a lot at stake when it comes to that, retaining the best people. And like you said, one of those things is the learning and development aspect of it, and that's where training comes in.

So what I would like to do is just kind of starting off this conversation sort of give you what I what I really believe is the industry accepted definition of training. Training is really about giving someone skill and knowledge to improve performance on their current job. So when a new hire is hired by an organization, maybe they've got some industry experience.

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**Jeff:** [00:06:31] Let's say they work in a customer service organization. They probably worked in customer service before, so they have a little bit of that background knowledge, but they don't know how to do things the way in which this new company that has hired them requires them to do things. So it's incumbent upon us as the organization and then the learning and development arm of the organization to really set those people up for success and give them that skill and knowledge so they can go out and do their jobs accordingly.

Training has to go beyond just that new-higher class. That's where we get into the developmental part, the D out of L and D and training and other opportunities like coaching and mentoring, which sort of falls under the umbrella of training. That's where we can begin to put aspects in place, not only to give them that baseline skill and knowledge, but really help to grow and develop and to foster them into the ideal employees that I think any organization would want.

**Jamie:** [00:07:28] Mm hmm. Yes, fantastic. And I love that idea of, Hey, you know, it's giving them skills and knowledge and then that development, peace of kind of taking it to that next step, too.

**Jeff:** [00:07:38] Not to disparage the industry, but there's a lot of bad examples of training out there. That's where we get into which we've probably all seen it or set through one. Heck, I've even in my early days, I've even designed and delivered one of those death by PowerPoint presentations. That's not training, that's simply a presentation.

We have to give them some baseline knowledge of what's required as far as like policies and procedures go. But one of the things that takes training to that next level, if you compare to just a basic presentation, you're giving people an opportunity to practice their job in an environment which is controlled.

We can learn from those mistakes, we can rectify it. And therefore, when it's time to take the training wheels off and send them out into the wilds of the call center or wherever it is that they're going, they're set up for success and they're ready, ready to go. Because not only do they know the information, the knowledge part of it, but they practiced it already. The skill part of it?

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**Jamie:** [00:08:39] Yeah. Perfect. Awesome. All right. So I want to talk about like how we deliver training to and what are the modes and strategies around that. Because and here's I'm just going to tell you the story of why bringing this up. So when the pandemic first started, so one of my clients I've been working with for a couple of years now and the client, the time you know, I was at the time, I was supposed to be out there every single month working with them on site, you know, doing kind of this work with them in person.

And when the pandemic first started, he was like, You know, I just don't think it has the same effect, like, let's wait it out. And of course, at this time, we didn't realize how long we'd be waiting it out, right? But like, let's let's pause, let's pause for a minute, they're going to figure out some stuff. And he said, Jamie, I just don't think it has the same impact if you're not here, like if you're doing this training class, but it's over, you know video, I just don't think it's the same and I think you need to be here, right? And of course, we got to a point where that wasn't viable.

**Jamie:** [00:09:37] And so it was either we've got to switch to virtual or or you're putting pause hitting pause. And that was definitely not something he was OK with. So we're like, OK, well, let's figure this virtual delivery out. And he sat through one of the first ones and he's like, OK, I changed my mind. It can be just as impactful. And so that really kind of became the primary mode of what we did for the last year and a half.

And so but it doesn't mean it's easy, right? It doesn't mean it's easy and it doesn't translate directly, and it may not be the right fit for everything, right? Like, there might be different reasons that you would choose a different strategy or mode. So tell me a little bit about when when people are thinking about training, hey, we need to train. What are some different ways that training happens and how should they think about what method is best given the scenario?

**Jeff:** [00:10:29] The global pandemic did create some awareness on what training strategies are available, particularly during the pandemic. We kind of had to shift from that instructor-led face to face to virtual. But once we did that, I think people sort of realize that it's good and it can be effective, but it's not for everything.

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So let's talk about two kind of groupings or classifications. The first one is called traditional training strategies. They're called traditional because they've been around since Moby Dick was a sardine, so they're tried their true and they work. These can be everything from job aids to where we give people maybe a trifle document, recipe sized card. Now you're not going to get a lot of that skill practice in there. But if we just need to inform someone or maybe an updated policy or something, a job aid works.

Another one that falls under that umbrella of traditional training strategy is self-paced instruction. I don't know if you ever have taken like a correspondence course now. Again, not virtual. But back in college, I took a couple of correspondence courses that's also under the umbrella of traditional training strategies. Then there's OJT, any idea what the acronym stands

**Jamie:** [00:11:38] For on the job training?

**Jeff:** [00:11:40] You got it. There's on the job training, sometimes in organizations, on the job training is done by someone from the L and D world. But in other cases they're done by like maybe a senior person or a manager or a supervisor. And that can be some really good real world experiences. But you have to get somebody who's sort of qualified and knows how to do that. Just because someone can do their job doesn't mean that they can teach another person how to do it.

**Jamie:** [00:12:05] One hundred percent, yes, that is so true, and I know everyone listening has had that experience.

**Jeff:** [00:12:10] And the last one that falls under that traditional strategy, which most of us know because we've experienced it before. It's the acronym ILT. It stands for instructor led training. Some people refer to it as face to face because it's literally what happens is we schedule some time in a conference room or training room and we assemble a group of people couple hours, half day, full day, maybe a week, depending upon what the content is and that facilitator or that professional trainer walks you through that course or that program. So those are under the umbrella of traditional training strategies.

Now, I'm not a training historian, but from my knowledge, I'd say maybe late nineties early two thousands. What came on the scene was e-learning and e-learning today, and it's had a little bit of an evolution since

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it came on board. E-learning today is kind of lumped into two specific categories again under the moniker of e-learning.

There's what you call asynchronous training, and here's how I remember this. Asynchronous that a means alone. So if you've ever taken a web based course or computer based course, a lot of organizations, these are your mandatory compliance trainings on ethics, the avoidance of sexual harassment you sign on, log on the computer, watch a couple videos, go through a little bit of a tutorial. You may have to take a test or an assessment.

**Jeff:** [00:13:36] If you don't answer the questions right, it may have you to do it all over again. If you answer it, you've got a completion box check move on. That's asynchronous. You're doing it alone. It's usually a web based or something that's more computer based.

Then there's what we call synchronous learning. The most relevant example here is virtual classroom. So I do virtual trainings all the time. I am in one place, geographically in one place, and my learners can be anywhere in the world. So it is live and it's online industry. Best practices for virtual classrooms say lasting anywhere between an hour to three hours. We've kind of found that that sweet spot is between like that two to two and a half hours, but that's how we do the training in that realm.

And then there's kind of a third one, if you will. It's called blended learning. And like you said a little bit earlier, how sometimes it's not a one size fits all because it doesn't always work with one strategy. Blending is when you begin to use different training strategies together. So at a high level, those are your training strategies. And as organizations figure out which one or ones are we going to go with? Those are a couple of the considerations that need to be considered in order to get the best and the most feasible one.

**Jamie:** [00:14:51] Yeah, for sure. And I'm listening to you and I'm thinking like, Oh, everything I'm doing has is like a blended approach even from before when I was in corporate. And so we would use Gemba Academy, which is web based, training prerecorded videos.

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But then I actually built out a whole curriculum to turn that into instructor led training where they would they would do some asynchronous video watching. They would come in, they would do some activities so like experiential learning activities and then they would have practice to go out and practice over the course of whatever.

And so, you know, it's interesting to hear you talk about it. And I think when you when you think about, we've got to make sure that there's information that we're giving the information, but that we're also giving that practice in the skill building. And that's where, you know, when you're thinking about those strategies, how do you get both or which one do you need in this moment in this way? And I might be able to get information shared through web and then practice could be virtual, but it could be instructor, virtual or whatever.

**Jeff:** [00:15:52] Yeah. And I'm curious, you said that you were kind of doing it. Did you know at that time that you were doing a blended learning solution or was it not until this conversation you were like, Oh, we were doing this all the time, and it really has a name. It's called blended learning.

**Jamie:** [00:16:06] Yeah, I mean, I wouldn't have known like the definition of, you know, what do you call it? What I knew is that if all I did is say, Hey, look, here are these resources. Here's all these videos you can go and learn that that wasn't going to get behavior change and adoption. And so that's where that's why I needed to add in these extra pieces where we were kind of taking them on a journey together.

**Jeff:** [00:16:29] Very nice. Yeah. You were doing some successful blended learning approach. Just so kudos to you and your team for doing that. Whether you knew that it had an act or an actual term to it or not, you were doing it, so good. Good for you guys. Yeah.

**Jamie:** [00:16:42] Ok, well, I also want to talk about how we use training. And here's the example I'm going to get. I can tell him, like every question I have for you, starts with a story.

**Jeff:** [00:16:53] I love it. I love it.



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**Jamie:** [00:16:55] But so, so a lot of our listeners are practicing continuous improvement. Part of practicing continuous improvement is problem solving and root cause analysis. And when I remember working with a team to help them develop their root cause analysis skills so they could better define the problem and when so we would do this five Why and they would get to this root cause and, I don't know what percent, but so often the root cause would be team member didn't follow process and the countermeasure would be need more training.

Right. And that wasn't really the root cause, and that wasn't really the appropriate countermeasure in most situations, right? But it was just it was such an easy go to like it was an easy default. And so we would default to sometimes some of us default to more training as the solution. But let's talk about when training really is a good solution. What when should we be thinking? You know what? Training might be a next step here

**Jeff:** [00:17:53] When something goes wrong, when there's what I call a performance gap, when people are not doing in some shape, form or fashion, what they're supposed to. A lot of times the easy default, go to it. Send them to training.

We want to take a look at the required performance of what this worker or this employee or this team is required to do, and those are usually found in job descriptions, a policy and procedure manual. I want to take a look at what they should be doing, their required performance versus their actual performance, what they are doing and if the actual is not the same as required.

Well, Houston, that's where you have a problem because their actual performance is not equaling what their required performance is. But we have to figure out what this problem is so we can recommend the right solution.

From our research in L.A., there are seven things that need to be in place within an organization. And if they're not in place, you're going to look at some performance gaps. It's just going to naturally happen, and I won't go through all seven. I might mention a couple here and there, but the bottom line is training is only responsible for one of them, and that is knowledge and skill. The same two words that came up in our definition.

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So case in point, one of the seven factors that performance is what we call standards. Standards are things like your policies, your procedures, your guidelines, et cetera, et cetera. But here's where I've seen some issues before. I've been in some organizations where standards and they don't exist. So when a standard doesn't exist, how can you expect an employee to follow that rule or that guideline when it does exist? So once the guideline has been established, then now I can train around that guideline.

**Jeff:** [00:19:39] So we have to be really, really clear on what's causing the problem. One of those seven factors is what we call capacity. This is having the mental, physical and emotional capacity to do a job. And sometimes when people are going through a tough time in their lives, they're going through a divorce. Maybe a spouse has a terminal illness, maybe a home was foreclosed. A child has been sent off to the other part of the world to fight in the war or whatever.

A lot of times these things weigh very, very heavily on the employees hearts and minds. And I know I've been through it and you probably have to shoot. If you live long enough, you've gone through something. And sometimes we bring that stuff to work or it impacts our work. We try not to. We try to put on this stiff upper lip and grin and bear it and do our jobs.

But the reality of it is sometimes it impacts our work. Well, we might start running into some of those performance gaps and that manager, not to throw managers under the bus, but this is the conversation I usually have. Oh, she used to perform at this level, but now she's at this level.

Can we do, I don't know, self-esteem and assertiveness class. Can we do some sort of training? Let's say, if we have an employee assistance program to where maybe we could get that person some help for whatever that is. Let's start there first to see if that's more of a feasible solution, for sure.

**Jamie:** [00:21:06] So we've got on one side, then some folks are like, Oh, trading the solution for everything. And on the other side there, we also have folks who are like, Oh yeah, OK, training is fine for that, you know, very technical. This is how you run the machine.

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But all that like people stuff and communication and listening and empathy and all of that stuff like, we ain't got time for that. It's just soft stuff. We got we've got work to get done. So what's your reaction? Maybe for people who who don't fully value maybe some of that learning and development that's on kind of, I guess, less direct skills.

**Jeff:** [00:21:45] I never use the s word. I never use the soft word. Uh-huh. And I have really, really learned this, Jamie. It discounts just by using the word soft. It discounts the importance of some of those, those courses or those topics that you just mentioned. Communication, business etiquette, time management. So I'm never in conversation.

Now I may use it one on one with another training professional because we know kind of the real deal. But when I'm having a conversation with someone outside of the learning and development world, I never use that term. I have kind of come up with my own moniker for it. You want to hear? I do.

They're called professional development skills. And a lot of times when just the rebranding and repackaging of that, sometimes that has a tendency to create kind of a paradigm shift as it relates to the importance of those things. So that's one of the small things that I've done to sort of combat that, that negative connotation or that attitude that these things aren't important.

But I want to share a quote with your audience because this is a quote that I've shared with some of my clientele before. Now, granted, I do it in a very tactful and diplomatic way because I don't want to create any more animosity than the necessary. But the quote is, "If you think training is expensive, try ignorance." And it was said by a guy by the name of Peter Drucker, who is an author and a management consultant.

And while expense may not be the thing that people are pushing back on, but to me, that quote translates into a lot of other things if you don't think. Basically, what I'm trying to say is we have to prepare our folks so well, if a time management class may not be on your radar because they need to focus on other things.

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**Jeff:** [00:23:33] Well, what's going to happen when when the time comes to where they really have to be very conscious and mindful of their time? You know, we can train them then, but it might be best to go ahead and train them now. So when that time comes, they're ready and prepared to handle these things.

So it sort of goes back to our original quote a little bit earlier. Learning and leadership are indispensable. You are a leader. So why not allow your learners, your staff, your team member, to take advantage of every opportunity that we have afforded to them?

Give them skill and knowledge, not only to do their current job, but prepare them for other aspects that they're going to deal with in their everyday working life. You might not want to send your folks to training because it takes a long time and it's going to be costly and expensive, and in some cases it is. But we may be able to abbreviate some of that time, or we may be able to shave off some of those expenses.

When you know that as a manager, after they leave my classroom, a lot of this is now incumbent upon you as a coach and a developer and a leader to develop your employees. And I just think sitting down and having those conversations and answering questions, a lot of people don't know certain things, so I invite them to ask any question that comes up.

So answering those questions, having those conversations and really getting their commitment to set their people up for success. I find that sometimes you can sort of change that perspective or that ideal of, well, we want training, but just not now.

**Jamie:** [00:25:08] Mm hmm. Yeah. Perfect. Love it. All right. So, Jeff, as we wrap up today's conversation thinking about our listeners, our listeners, listeners are improvement minded operations executives and operations managers. What words of either encouragement or advice would you leave them with today?

**Jeff:** [00:25:27] Take advantage of the training opportunities that your and people have. I don't know whether a lot of your folks who listen and tune into the podcast, whether they have where they work, whether they have a standard learning and development department.

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If they do come to us, we want to help. We are really a service arm of the organization. We are here to help. And even if you're your listeners don't have internal led departments, there's always an organization out there like mine that will do it and we'll do it for a fee. But we want to help. So approach us, approach us with your challenges, approach us with your issues. We want to help solve those.

**Jamie:** [00:26:11] All right, Jeff, fantastic. Thank you so much for joining the show today. We are going to put links for people to connect with you and learn more about you in our show notes. So everybody will be able to go there and connect there. And thank you so much for joining today.

**Jeff:** [00:26:25] This has been a wonderful experience. Thank you very much. I will come back and talk about training any time, so just let me know.

[00:26:35] I have had so much fun getting to know Jeff over the last few months, and he's really right about these parallels between learning and development as a discipline and process. And, you know, Lean operations, I hope you heard those parallels as we talked about really defining the problem, understanding the root causes and selecting the countermeasure, the solution and the delivery method based on those needs.

Now I do want to highlight something, Jeff said towards the end of the conversation, which is that really only so much happens in the classroom or in the training experience, and managers play a big role in the success, the result of training. And so what I want you to know is that you can outsource training, but as a leader, you cannot outsource development. You can outsource training. You can outsource some of the mentoring. You can outsource some coaching.

I do all three of those things for clients, but development you have to own as a leader, you need to be directly involved in the reflection and the processing your one on ones with with your team is a great way to do this. You need to be directly involved in the application, the practice, the implementation, the moving from knowledge and skill, and having knowledge and skill to using knowledge and skill on the job.

You know, when I work with clients, sometimes I just provide the training part and the client does DIY. They own all of the follow-up and the execution, the implementation. And then sometimes I also provide

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mentoring and coaching and strategic planning and support for the managers and for the executives who are then following up on the training and development. So here's what I want you to think about for your next step now, of course, you can choose something different if you want.

If you heard something in this episode that really resonated with you. Feel free to choose something different, but this is what I recommend. I want you to think about someone in your span of care. This work on working, on developing right in a particular skill or particular area, whatever it might be for them. And so think of this one person, have this person in mind.

And then what I want you to do is reflect on how actively involved you are in that development. How often do you listen to their experiences and their reflections? How often do you ask about how it's going? How often do you observe what's happening? How often do you give encouragement and feedback on their skill development or the application of the skill and knowledge?

Reflect on how actively involved you are. And then decide which of your actions, what are you doing that you want to continue to stop or to start? All right. That wraps us up for today's episode. Remember that you can head to [processplusresults.com/podcast](https://processplusresults.com/podcast) to find the links and connect with Jeff directly.

We continue our Q1 executive series the next two weeks with Chris Wilson, vice president of operations at Wilson Manufacturing, and Greg Jacobson, co-founder and CEO at Kinesis. And of course, you can also tune in to the last two episodes with Keri Sagan's and Jested Woodard. They're both fantastic. Be sure to subscribe or follow on your favorite podcast platform so that you never miss an episode. Until next time.