

Learning goes global

Edward Nathan of Wyeth Pharmaceuticals argues that selecting priorities, managing resources, developing metrics, working with vendors and collaborating with overseas partners are crucial for organisations that need to reach a global audience with their training initiatives.



Edward Nathan

Do sales representatives (reps) sell the same way in Japan as in Turkey? Do sales managers need the same skills to coach their people in Brazil as in India? Does the product management process look the same in Morocco as in Canada? Adapting training and development for a global audience takes the process of creating training and development (T&D) materials to a new level. It requires a shift in thinking and a commitment to focus on commonalities, not differences.

Getting started

Who are your key stakeholders? Who makes decisions on internal resource utilisation? What metrics do these people use to measure success? To have this discussion, we need to assume that:

- You work for a multinational company.
- You have headquarters in one country and affiliates or subsidiaries in other countries.
- T&D is not yet viewed as a high-level business function within the affiliates.
- The affiliate training manager and his or her department are at a lower organisational level.

With this scenario, it may be more effective to work with the affiliate top managers as stakeholders. It may be too difficult to get sufficient time from a country manager to help address the relevant issues, so you may need to access the next level of senior managers.

You need to crawl before you can walk

Getting agreement on what needs to be covered in training is the first step. Developing competency models and tools to help drive training content is one of the most important tasks of a headquarters training function. Developing competencies with global relevance is challenging, but well worth the investment in time and resources.

After you have identified training needs, you can look at different delivery options – classroom training, distance learning, field training and so on. Very often, the content will help drive the methodology you pursue, but it is further complicated by your affiliate infrastructure. Do sales reps have access to the internet? If so, is their access through broadband or through an analogue telephone modem – or even something in between? If online access is not feasible, will a CD-ROM-based approach work? If so, do your reps have CD drives in their laptops?

While the answers to these questions can be provided by an affiliate IT department or even by the local training managers, involving the high-level stakeholder can help identify dissatisfaction with the current status quo. For example, senior sales managers may believe that their affiliate has not yet been able to leverage the investment in laptops for the sales force but, by using the laptops in training, they may be more inclined to provide incremental resources to reap greater benefits from the equipment.

Metrics: an opportunity to demonstrate the T&D contribution

The metrics Wyeth commonly uses build on the four levels of the Kirkpatrick model¹. In fact, when you work with affiliate stakeholders, agreement on what metrics are important to them will help guide your evaluation process. We have found opportunity cost analysis to be a valuable tool in that process. In fact, we are developing statistical analysis methods to develop levels four and five measurements (see Table 1).

The weakest link

Your global infrastructure is certainly an important driver for your selection of training methodology. There are some developing countries where it is very unlikely that the sales people are likely to use laptops within the next three to five years – what are you going to do with those markets that do not have access to technology? The Wyeth approach has been to develop a hybrid solution. Very briefly, this involves developing an e-learning program with associated text files that can be printed out for those markets that do not have e-learning capabilities. The print version is more detailed than would actually appear in the e-learning modules, since the latter include video and

audio components. The incremental increase in costs of developing this hybrid approach is more than offset by the flexibility it affords in supporting a variety of 'infrastructure-challenged' markets.

Method in our madness

Classroom or meeting time is hugely expensive and should be minimised. In Wyeth's international markets, it used to take five days of classroom training to move reps from no knowledge to competence in the area of vaccines. Limits in technology infrastructure for those markets selling vaccines limited our distance learning options, so we contacted Celemi, a Swedish company, which helped us develop a series of 'workmats' that reduced the five days to one and a half days. Using agreed metrics, we were able to demonstrate improved knowledge and skills compared with the longer classroom programme. The opportunity cost analysis also revealed that the upfront costs of developing the workmats were offset by the reduction in classroom training time.

Going the distance

Since the introduction of the workmats, Wyeth has added electronic distance-learning elements to support some background product information. Again, the classroom training was adapted to include application skill practice to allow learners to utilise the new information in a supportive learning environment. What about those markets without e-learning infrastructure? We used the hybrid approach discussed above, which provided a text-based programme as an alternative to the electronic program.

Going global

So, what needs to be considered when developing global training programmes for the electronic or classroom environment? Here are some ideas:

- **Classroom-based programmes.** Classroom materials need to be easily translated, but the key element to focus on is how the classroom activities will 'travel'. Word-based exercises, such as crossword puzzles, will be more difficult to translate for global use. Likewise, activities that have a lot of cultural anchors – such as game shows and sports activities – will be more difficult to transport. Role-playing, board-type games and similar activities seem to be easier to translate and adapt.

Table 1. Table adapted from Donald L Kirkpatrick's Evaluating training programs: the four levels, 2nd edition

Levels of evaluation			
Level	Also called	Administered to	Administered by
1	Trainee reaction to the training	Trainees	Trainer
2	Learning measure	Trainees	Trainer
3	On-the-job application	Trainees' supervisors	Trainer, training management/HR
4	Impact on business results (quality, production, sales and so on)	Organisational area(s) impacted by training	Training/ business management
5	Return on investment	Organisational area(s) impacted by training	Training/ business management

- **Print programmes.** Is there any possibility that cultural norms will create a problem? In a program used to teach sales managers how to organise their home office, it is acceptable in the USA for the new sales manager to visit a mentoring sales manager's home office via an invitation. In several European countries, this would be completely unacceptable. An alternative approach was used where a 'model' home office was set up at the affiliate headquarters.
- **e-learning.** If you are developing e-learning programs for global use:
 - Design programs from the beginning with the intent of creating a global program.
 - To accommodate foreign languages whose text can be longer than English, use scroll bars and not fixed frames to avoid having to add extra frames just for translation.
 - Place the text to be translated into easily exportable files.
 - Re-importation of translated/adapted text should be a simple process, followed by a simple compilation process to create the 'run-time' version of the program.
 - When adding navigation controls, use icons and not text.
 - Text should not be embedded in graphics but should be overlaid – again to simplify the translation process.
 - Communicate with your affiliates while in the planning stage so that they can budget for the translation/adaptation of the program.

e-learning – particular considerations

If you are a training manager in an affiliate and are responsible for translating and/or adapting a headquarters-created program, consider the following:

- Determine which company programs you will want/need.
- Plan your budget for translation and adaptation.
- Identify local vendors to assist in translation.

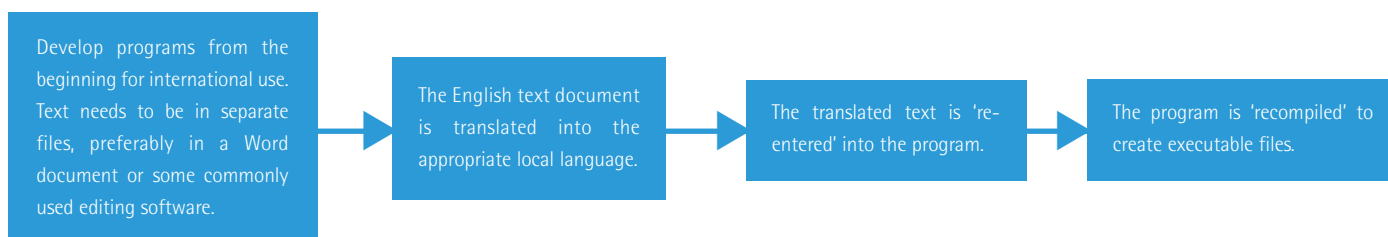


Figure 1. A process for distributing, adapting and translating global e-learning

- Create buy-in with your marketing, sales, medical and IT groups since they will be involved with content review, implementation and roll-out of the program.

When working with vendors, consider the following global issues:

- Vendors frequently see dollar signs when developing international programs.
- They do not understand the international translation/adaptation process.
- They need to be trained in cross-cultural issues.
- Each language translation from the original source language should not cost more than 15 per cent of the original program if designed properly.

Consider also the following local issues:

- Translation should be done by translators, not by software vendors.
- Reverse engineering should be avoided.
- Changing content is acceptable, but changes to structure should be kept to a minimum.
- Competent in-house liaison is vital to work with vendor(s).

Strategy and tactics

Part of the challenge in developing global training is that companies have immediate training needs that need to be addressed, while an overall vision and strategy for T&D may be lacking. This is especially true with e-learning. You may have individual stand-alone programs (CD-ROM-based) that you would like to use in your affiliates. Being able to use those programs should not be dependent on whether a long-term e-learning strategy is in place. The trick is to develop a long-term strategy while implementing short-term, stand-alone programs to meet immediate needs.

Many senior managers hesitate to support stand-alone projects until a long-term vision or strategy is in place. While understandable, this mindset can paralyse any forward movement on e-learning initiatives. Wyeth has

taken parallel tracks. While continuing to develop stand-alone projects, we are creating a long-term strategy that includes the migration to a learning management and content system which will help drive learning resource management, assessment, students, instructors, content development and multiple language translation/adaptation processes.

From a practical standpoint, we have made the following distinctions:

A training strategy

- Is long term (more than one year)
- Requires significant financial and organisational resources
- Involves redesign processes for developing and distributing learning
- Involves design processes for managing learning resources
- May be regional or even global in scope

Training tactics

- Are short term (less than one year)
- Can be implemented today
- Involve financial resources – modest, but organisational support is required
- Are applied independently, but are aligned with strategy
- Are implemented locally

The challenges of moving your organisation's learning initiatives to reach your global audience effectively are considerable. Selecting your priorities, managing your resources, developing metrics, working effectively with vendors and driving the process in collaboration with your overseas partners is key to creating a successful outcome. ■

¹ Kirkpatrick, Donald L. *Evaluating training programs: the four levels*, 2nd edition. Berrett-Koehler Pub; 1998. 275 p.

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