

**JASON KUNKEL:** Morning, 8AM session, we can do it. Come on, we've got it, we got it. Thanks for coming out, this is my first time teaching at AEU, so I'm really excited. So and kind of tagging along with this, this is actually Donnie's 10th year teaching here, kudos to Donnie. We've got the newbie and the veteran helping you out, and hopefully we'll get you along the way and teach you some stuff.

So Seven Deadly Sins of Corporate Training Programs is what we're doing here, and next slide, you go first.

**DONNIE GLADFELTER:** Not rehearsed, not staged at all. We'll probably have a bunch of these, this is your slide, this is your slide, but bear with us. So as Jason mentioned, my name is Donnie Gladfelter. Little about my background, Jason and I, we both work together at CAD Microsystems, we're a reseller based out of the D.C. Metro area. He and I both work out of our Richmond, Virginia office. But we both come from a background of training.

Specifically, I come from a civil engineering firm that was about 250 people when I was with them, with about nine offices throughout the Mid-Atlantic. And I was responsible for helping stand up the corporate training program that we implemented there. Not to mention, of course, the training that Jason and I inherently do in our positions. I'm also AutoDesk certified instructor, and author of the *AutoDesk Authorized Training Guide: AutoCAD and AutoCAD LT, No Experience Required*. So training is one of those topics that has some very deep roots. Something I'm incredibly passionate about, and something I know Jason is also very passionate about, as well, for similar reasons.

**JASON KUNKEL:** So my name is Jason Kunkel, I've been working in the AEC industry for a little over two decades now. It's a little tough for me to say out loud, but there it is. Started out doing design, kind of slid over to the IT world. I'm sure it's a story that most of you have heard, or a lot of you have lived as well.

Like Donnie, back in my prior firm, I helped set-up and spin-up our internal training program. We had, at our height right before 2008, we had a little over three hundred people in our firm, five locations. So lots of different disciplines, lots of different things to pay attention to. Then beyond that, I headed up the IT school within our internal university. So I was responsible for doing training there, picking classes, picking teachers, and going on from there.

And like Donnie, this is kind of near and dear to my heart. I come from a family of educators, so I certainly do not want to actually go and teach high school students or elementary school students, but there's kind of that feeling about the importance of teaching in my family that's been stuck in my blood.

**DONNIE**

**GLADFELTER:**

I forgot to put this little piece in here, Jason mentioned this is my 10th consecutive year of presenting at AEU. My very first year 2007 of course-- anyone happened to attend my session The Training Trinity? No, OK. Anyone that's been here for 10 years? OK, we've got a couple, all right. So I don't feel bad that there's, out of the two or three people who have been here for 10 years.

Anyway, all right, let's go ahead and get into this. So Why are Jason and I doing this, we have already expressed our passion for this. Some things that this class is not, I think it's important to state that as much as it is to state what this class is. This class is not an AutoCAD class, it's not a Revit class, it's not a--

**JASON KUNKEL:** Dynamo.

**DONNIE**

**GLADFELTER:**

Dynamo, an AutoDesk live. This is a process, this is something that it doesn't matter if you're trying to teach AutoCAD or Microsoft Word in your company. Or if you're trying to teach them some other soft skill. This is ultimately a training class, and that's what we're really going to be focused on. We're not really going to be spotlighting any of the technology, so to speak, but rather the processes that helped us make training successful in our own companies.

We're quite simply learning from our mistakes. We've tripped up along the way, we've scuffed up, had to brush ourselves off a number of times. And while I don't expect anything that Jason and I are going to share with you guys this morning to be revolutionary ideas that nobody has ever ever thought of before, hopefully the assembly of these ideas is really the big takeaway for this class for you guys.

So specifically, some of the things that we're going to talk about this morning. These are the objectives out of the class that you signed up for. We are-- actually you are the one that was supposed to do the...

**JASON KUNKEL:**

Oh look at that, so these are the objectives you signed-up for in the class this morning. We've broken these up into four major groups, we're going over the factors, those are your sins, we're going to talk about the sinners. We're going to talk about your virtues and then the path

to virtuosity along the way. And like Donnie mentioned, this is not, here's how you teach AutoCAD, here's how you teach Revit. This is a holistic overview for the ideas that you will need to build-up and get your organization spun-up with a holistic and all encompassing training program.

So our seven deadly sins, sin number one, miracle in the classroom. We're going to go, I'm going to go take a class, and I'm going to immediately know how to use that software. Sat down in my Revit class, eight hours a day, four days. I know it, I got it, it's perfect. If we want to take it to that next step, I've sat in on a three hour conversation with somebody about quantum physics, and now I'm an expert in that. No, no that doesn't happen.

**DONNIE**  
**GLADFELTER:** You know when you run into that one? All right sin number two, classroom is for training and the workplace is for working. It blows my mind that, this idea that work gets done in the workplace, and we shall not teach anyone to do anything in the workplace. Don't do it, don't do it. And similarly, if come to my classroom, you better not be doing work. The idea here is that the workplace is a place for learning, regardless of what little corner of the office that I happen to be in.

**JASON KUNKEL:** Sin number three, teach everyone right now. We just bought this new software, we're going to teach you this new software. You're not going to use it for two years, but we're going to teach you right now, and you're going to remember how to use it two years from now. It's going to be great, it's going be fine, there can be no problems at all.

**DONNIE**  
**GLADFELTER:** Anyone remember what they were doing two years ago? All right, sin number four, everyone is trainable. Now this is probably that sort of unmentionable sin in the world of training. We like to think that we hire the best and the brightest people for our organizations. And I'm not going to counter that, I'm going to agree with you that we all strive to hire the best and the brightest people. But the fact is, not everyone should or can, frankly, be an AutoCAD or Revit user. They have other skills and other talents that they can bring to the organization, but just because they are a smart person doesn't necessarily mean that they can learn or be trained on everything that I might want to train them on.

**JASON KUNKEL:** Sin number five, the only classroom people need is work. I never took official training, I never sat down and got taught. I learned it on the job, and that's how everybody else is going to learn it, too. You don't need class, you don't need formalized training, just roll up your sleeves and tooth to the grindstone. Is that the expression I'm going for? Anyway the idea that formal

training is not necessary. That's sine number five for ya.

**DONNIE** Number six, the perfect class. Anyone strive for this one here? So there's a couple symptoms  
**GLADFELTER:** of this one. There's certainly the, I designed this class for AutoCAD 2000, not much has changed in AutoCAD in the last 16 years. I don't need to change that at all, keep on doing all your stuff in paper space, don't worry about the layout tabs. The other one, too, is the behavioral aspect of the trainer, or the training manager as well. Back in my day, I learned by reading books, and, you know what, you should be up to read the book, too, and learn everything that you need to about this. I gave you the resources, it's this 1,000 page AutoCAD Bible on your desk, why don't you know how to use it?

**JASON KUNKEL:** Says the man who wrote the 1,000 page AutoCAD bible. Number seven, establishing a finish line with no mileposts. The idea that we're pushing people to do this training, and then, you're an expert. This is where you're going to be, but not giving you those proper steps along the way to get you there. We give you that last step, but we're not filling in the proper gaps in the middle there.

All right, so those are our sins, we want to talk about our sinners a little bit. These are employees, these are the people not just taking the class, the people also developing the class. The people managing the training and organization as well.

**DONNIE** So we'll start off here, and that is the way that adults learn. We mentioned that whole, the  
**GLADFELTER:** perfect class syndrome, and just because I learn from reading, doesn't mean that my entire program should be designed around that. These are the four primary ways that adults learn. And we have to be cognizant of this as we are building the curriculum, as we're building the program itself. Most of us will favor one of these methods, but likewise, most of us use two or three of these to actually retain a piece of information. So this is a pretty common thing visual, auditory, read, write, and kinesthetic.

I see some people snapping some photos, so I'll let them do that. So this goes into the second piece. I find a lot of I've worked with have built training programs absolutely mindful of these methods. But if there's one component that I find so many programs, and I'm guilty of initially standing up programs like this as well, that if we don't have it, the chances of your program actually having any success is very limited, and that is reinforcement.

So this is a study that was done, that with how reinforcement-- by the end of this class, there's a good possibility you're going to walk away with about half of what we share with you guys.

**JASON KUNKEL:** Hopefully, you'll remember my half. It's the important half.

**DONNIE**  
**GLADFELTER:** Thanks, I love you. Tip your waiters. By the end of AEU, 80% of what you came here, what your bosses spend all the money to send you out here to Vegas for, without reinforcement you will forget up to 80% of. And by the end of the month-- of course this is not accelerated by the alcohol that's here, right? That we'll forget up to 90% here.

And so while teaching styles and dynamic instructors can help move the needle more in favor of your learners, the fact is, if we're not building reinforcement into our programs, we probably aren't really teaching our people much of anything.

**JASON KUNKEL:** So continuing along with our sinners. This is more for the trainers, this is more for the folks standing-up the training sessions. And this should be our first big head knot, if we're comparing our classes. We're talking about our in-person versus our online training. In person training, what are the benefits? There is interaction, I could walk up to a student and interact immediately, I can respond right away. You've got that 101, we can change the flow, we can see what's going on in the class.

Desk separation, no, let's go back, we're not done. Desk separation, network with peers, I mean you're at AEU, you know the benefits of being around people you work with. The disadvantages, of course, takes time, takes a lot of time to get everybody in that class. And there's challenges logistically as well.

Back when we split up our training program, my old firm, we decided we would have all the classes in-person at our headquarters. We needed to pay for rental cars, we needed to pay for hotels, but that was important to us. We knew that was a major disadvantage, but we thought it was more important to get people in the classroom together.

Flipping that on its head, for online training, you kind of flip those, too, right? Online training, you can get it whenever you want. You can stick it in front of people, they're sitting at their desk, they do it whenever they need to do it. But you don't have that personal interaction, the instructor is hiding somewhere, and you can't see them, and you don't know how to deal with that.

**DONNIE**  
**GLADFELTER:** Kind of like his voice in the back of the room we've got.

**DONNIE**  
**GLADFELTER:**

**JASON KUNKEL:** So those are our sinners, those are our sins, our seven virtues of successful training programs. This is our ingredients, these are the seven key pieces that we have figured out. You're going to need to either have, you may have some of them already, you may have to get some of them. But these are the pieces you want to make sure you have, to make sure your training program overall, holistically, we're talking of overall training program, is up and successful.

**DONNIE GLADFELTER:** So the first here is to establish an education mission statement. This is one of those ingredients that I feel like so many of us, oftentimes, will skip over. And here what we have to do is essentially answer, why am I training? Is my training program about just the technology? Is it about the growth of the firm, is it about the growth of the individuals? And my answer to that question-- there's not a wrong answer to it-- but my answer to that will absolutely guide what I do throughout the rest of my training program.

The masters of this, in my opinion, are Disney. There's actually a book called, I think it's *Disney U*, is that right?

**JASON KUNKEL:** *Disney U* is in the title, I can't remember the whole title, yeah.

**DONNIE GLADFELTER:** If you want an awesome book to download on your Kindle and read on the way back from AEU, go check it out, it's *Disney U*. One of the cornerstones of the Disney program is this mission statement, and they test every new thing that they want to add to their training program against it. And again, there's not a wrong answer here, it's just what do you want it to be.

**JASON KUNKEL:** We didn't have a-- let's go back real quick, I'll tack on here. We didn't have a formalized mission statement back in my old firm, we just had a general one. But the idea was, we wanted to improve the employee, it was not about the bottom line, it was about making the employee better. So that led us to make decisions. We had classes on financial management, we had classes on time management, we had classes way outside the norm of just software and code and design. But that was important to our educational program and it fit within our informal mission statement.

Learning paths, this is another one that a lot of folks don't think about or do. A learning path is a set of guidelines for the individual students, every student needs a learning path. Now a lot of these learning paths are going to overlap, they're going to look the same. If you've got two project managers, they're learning paths, a lot of overlap there in that Venn diagram. but you

want to sit down with employees, you want to show them what classes are available, and you want to make sure that what they want to learn is what you need them to learn.

So this has a couple benefits. One, you're going to know what class is for the year you need to teach, we recommend doing this annually. So you sit down, probably incorporate it into your annual employee review process, so this is something that's going to be on the personnel manager. Needs be tied in, needs to have a formalized questionnaire. How do you like your university classes? What classes do you want to take? What classes would you like to see? So it adds that communication.

And it also starts to build a culture of the importance of training inside of your firm. It's not just one teacher over here talking about it, it's the manager and the employee talking about it directly as well. It sounds like it's going to take a lot of time, it really doesn't. It might have added five minutes onto our annual reviews to sit down and walk through, it's like, do these classes look good? Yes, these classes look good. What classes would you like to see? I would like to see these classes. And then when it was all done, we could aggregate it and the trainee manager was able to go and schedule the number of classes based on the number of people who were expected to take it throughout the year.

And one thing I'll tack on the bottom, we tried to highlight what sins that each of these virtues address down there. This one's a big one, this checks off a lot of those boxes. And it gets overlooked a lot, which is why we wanted to highlighted here as virtue number two.

**DONNIE  
GLADFELTER:**

All right, so continuing on, know your kingdom. And this is a multi part one here. Obviously the world of technology, the world of our business place, I'll even elevated beyond technology, the world of our business place is obviously rapidly evolving. To say that many of us do business the same way that we did before the recession, I think would be foolish, right? We've changed a lot who we are, what we do, and the way we do it. So we have to know who we are. And how do we stay ahead of that?

I think the big question here is, what are people breaking, as we're trying to answer the question of, what do people need to know? In my experience, We already have this answer and most of the time don't realize it. How many people here run a Help Desk internally? If you begin taking a look and considering Help Desk as part of your training program, it will help you actually address, or better address, the needs of your learners.

Beyond that, who knows what? This goes back to the "everyone is trainable" thing, as much as it does beginning to understand who our champions in our company is. We have specialists, we should leverage that. Who knows what and how do they know it? Smaller companies, you probably already know this, you can probably already say that, Kunkel is the expert at?

**JASON KUNKEL:** Everything. ...Word.

**DONNIE GLADFELTER:** Word, OK. He's a simple kind of guy, but the point is we have to know who our champions, are who knows what, because they may very well end up being our teachers. The second piece of that here is, what training is already happening? So the easy pieces, of course, if I do have a training program of some sort we can answer that question. But beyond that do your individual departments have monthly meetings, where somebody presents something and more of that learning capacity? How are you teaching when people come in and have a Help Desk concern, and they break something, and you're training them over the shoulder?

How what about vendors coming in and sharing information there? What of these methods do you use, where are you using them? And the big thing here is it's important to, frankly, steal the good content, and make sure that that's communicated.

**JASON KUNKEL:** Speaking of communication, another virtue, you need to maintain good communication. This is an inspirational poster on everybody's wall in the break room. Communication is key, communication is important, absolutely, it is. We want to highlight two specific means of communication here though.

First one, communication with your manager. If you are the training manager, if you are on the training management team, you've got to keep your owners in the loop. You've got to make sure you have that channel communication open. Have a consistent meeting, have a quarterly meeting, talk about the issues you're having with training. Talk about the issues with individual students. You want to keep that line open with them. I'm going to keep going back to the culture of education. OK, you can stand up a great training program, but if your organization doesn't embrace training and education at its core, it's going to fizzle off. Having those interactions with management, making it important to them, is going to then trickle down and have it be important to the employees as well.

Second one is availability, or accessibility. The training management team, you've got to be visible, you can't go hide in the corner, you've got to walk the halls. You got to talk to people. Doesn't have to be a formal thing, but you need to be accessible to the students doing the

training. There's a good chance the training managers, depending on your size, you're not going to be teaching any classes. If you're a small company, for 40 or 50 people, you might be training all the classes, and the accessibility is easy.

The larger you get, that accessibility is harder, and it has to be an intentional effort you make to go out there and just be available. So somebody can just this tap you on the shoulder and say, hey, when we did that thing over Go-To meeting the other day, the audio was terrible. Like OK, let's look look into a new speakerphone, or whatever, to kind of fix that

**DONNIE**

So we talked about the idea during the sins that the workplace is for working, the classroom is for learning. And I firmly believe that that is not a wall that we should ever, ever put in place at a company. We need to consider things like structured versus non-structured. So structured would be things like my actual classroom training, if I have what I like to refer to as impact training, many of you might call them lunch-and-learns, and I know Jason is going to hop-up up on the soapbox on that one.

**GLADFELTER:**

But also think about your non-structured learning. So Help Desk, when I taught The Training Trinity 10 years ago, Help Desk was one of the three components that I argued that every successful training program should have. We are, frankly, doing over the shoulder training when people reach out to us. The other bit is, back to the last slide that Jason mentioned with the accessibility piece, I can't go and hide in my office. The water cooler chats that I have just meandering the hallways are as important as anything that I do in the classroom. Because that's where I'm going to get that unfiltered, what things are actually prohibiting me from getting my job done.

**JASON KUNKEL:** So buck time?

**DONNIE**

Yeah, you can...

**GLADFELTER:**

**JASON KUNKEL:** Impact training. So impact training, this is kind of your structured time, but not necessarily structured topic training. You've got classes, you know what you're teaching a class on. Your impact training, you might have a monthly meeting. Now a lot of times, that ends up being a lunch-and-learn. I hate the idea of lunch-and-learns. I've got a rant that I wrote up, it's in the handout. We're going to get the hand up online today so you can download it. I apologize for me ranting. The idea-- who is doing lunch-and-learns?

Lunch-and-learns, oh my god. The idea of the lunch-and-learn, of course, is that you bring your lunch, you go sit down, you learn something. Even maybe the company pays for lunch. Here in the States, lunchtime is a little bit sacred, you might need to run some errands, you might need to go take care of something. And on top of that you might lose some people.

So lunch-and-learn tell the employees two things. They tell the employees that the topic is not really that important, they can probably skip out if they really need to skip out, and it tells them that their time is not that important. Because that lunch time is their time, and oh, here's a \$4 sandwich for your hour. Or maybe-- [INTERPOSING VOICES], maybe I'm not even going to buy you a sandwich. Fair enough. Yeah, \$10 large is not-- here you go, this is all your time is worth.

If it is an important topic, it is important enough to have it's own real consistent non-lunch meeting time. And I'm still on my soap box here, because it really... This is really tough for me. We had a Tuesday Revit non-brunch brunch. It was every four weeks, it was Tuesday at 10 o'clock, everybody had on their calendars, and it was important enough that we knew that we'd go in there and sit down and chat. It's 20 to 30 minutes, is usually it all ends up being. But this is a great opportunity to share this new information that you don't need a whole class for. Just please, kill the lunch-and-learns, just kill them off, kill them, kill.

I'll put an asterisk on there, sometimes you have a vendor come out and bring you a big lunch, that's fine. Vendors are going to buy you lunch, that's what they do. But in terms of internal official training, kill. I will get off my soapbox.

**DONNIE** All right.

**GLADFELTER:**

**AUDIENCE:** Our vendor of training, our vendor comes in and [INAUDIBLE].

**JASON KUNKEL:** Lunch-and-learns should be fine for that, they love to fork over the money for the lunches, and you don't want to, you don't want to dissuade them from coming in. But in terms of internal stuff to maintain that culture of importance.

**DONNIE** And frankly it kind of aligns with what Jason was saying that, while the vendor may very well value the information they're coming out to share with you, it's not a critical path-- you're not saying, you have to attend the carrier vendor lunch that we're going to have as part of your learning path. So if it's on you're learning path, it's important enough not to be a lunch-and-

learn.

**AUDIENCE:** I think if you find it interesting enough hand over your lunch, then it's kind of important.

**DONNIE** Right, leave the choice to the people.

**GLADFELTER:**

**JASON KUNKEL:** Yeah.

**AUDIENCE:** [INAUDIBLE]

**JASON KUNKEL:** Right, yeah, that's a more personal approach, definitely. Our next virtue, measure your progress. So a lot of this is easy. You're thinking online surveys for the classes, we've got online surveys for classes here. If you aren't using a out-of-the-box learning management system, we leverage Survey Monkey for all of our classes. You want to make sure you have those official surveys in the classes.

The things beyond this, that's the easy one. The one you want to pay attention to that you may not be thinking about are those soft metrics. And there's no real way to say, OK, go look for this, this or this, it depends on how your organization is structured, and how are things are set up. I'm going to go and piggy back on Donnie's Help Desk. So Help Desk tickets, if you go and you teach a class on plotting, you would expect, Help Desk tickets and request on plotting to drop. So that's what we mean by the soft metrics, you need to look for things like that. Have the number of questions gone down since I taught X, Y, or Z.

And you may find another clever way to figure out if it's working, if your training is being effective. But you want to pay attention to those, and definitely listen to them, don't just ignore them. If the questions on plotting skyrockets after you taught your plotting class, something is wrong with you're plotting class. And that goes back to your sin of your perfect class, you need to refine it then.

**DONNIE** And finishing up our virtues here, is what I like to refer to is the separation of policies and  
**GLADFELTER:** standards. At my former company, when we developed our training program, we were very intentful about making sure that training was in the training, and standards were standards. What I mean by that is our CAD standards manual, it said that text shall be 0.1 inches tall, this is our standard title block, these are our standard layers. So on and so forth, probably nothing revolutionary in terms of the content of that.

But what our standards did not include, the actual official standards document, was how to set up my text to be 0.1 inches tall. Or how to create a new sheet using the official company title block. The how-to and the what it should be were two separate entities. And that's an important thing, because the chances of me changing my standards from being 0.1 inches tall for text, even as I change from AutoCAD to Revit, or some other piece of software, is probably pretty slim. My standards are probably going to be a little bit more permanent than the methods that I go about training. And so it's important to keep those two separate.

**JASON KUNKEL:** So there are seven components, those are ingredients. What we've got now is just a general, broad roadmap, a series of steps to implement some of these things. Now you may already have done some of those, you may have already done some of these as well. So you've got to figure out along the way, where you are and what gaps you need to fill-in.

The first one we got, we're all sinners, pick your evangelist. Find the person who is going to be reigning your training program. If you are sitting in this classroom, chances are it's you, so heads up.

**DONNIE** Round of applause for you.

**GLADFELTER:**

**JASON KUNKEL:** Good job. Congratulations. This is an important role, it may not be an official role, it may not get a title, you may not get a boost in pay. But if it's important to you, you need to start sharing that. We call it an evangelist for a reason. Part of this is a publ-- 8AM class-- public relations job. You need to get out there, you need to encourage your employees that this is exciting, this is important, because it's important to you. You need to share that enthusiasm and make sure everybody is on board.

You're going to build that culture, you're going to make it important, and just make it permeate into the DNA into your organization. You don't want to stand this thing up and have it die in six months. If it becomes part of everybody's everyday speaking, if it becomes part of the DNA, it's going to live, it's going to breath, and it's going to catch a life of its own after that.

**DONNIE** Tagging on to what Jason was saying about the PR. We think of PR as the way to influence  
**GLADFELTER:** the people that I'm trying to teach, but I would also argue that it's about influencing the people who are going to pay for it. And so a lot of people do this, but maybe not to the full extent that it really needs to be. We typically will go out and we'll analyze things, we'll figure out what the lay of the land is. But what we failed to do oftentimes is we keep that data, that information, in

its disparate sort of raw form, and it doesn't come together to tell any sort of cohesive statement about what training is in my organization.

So it's imperative that if you are indeed the evangelist, you're probably the one doing this, going out and figuring out, what training do I need? What training do I have? What's really good about the way we're addressing things? What's not so great about things? But if I just present that raw data to management, or the people that are going to pay for this, they're going to be like, oh, that's nice. And the training will remain the T-word, how many people call training the T-word in your organization? I've run into a lot.

And so we've got to summarize it and identify exactly what it is that you're asking, you should have a 30 second elevator pitch of why training needs to be implemented in your vision that you've assembled.

**JASON KUNKEL:** Establish your mission statement. So you know all your information, you've chatted with management, you know it's important to you. You should know what's important to them at the end of the day as well. You need to set up your guideposts, you need to figure out what the overall guidelines and purpose of your internal university, your training, whatever you want to call it. Now, what are the roadmaps, why are you doing this? What is going to establish the rules for picking and choosing the classes that you are about to start establishing, and frankly, put a lot of time into getting spun up.

Pick your Deans, it's Dean, it's Vegas. It's you know, trying here. If you are a larger group, you can't do this by yourself. Even if you're a smaller group, you probably can't do it by yourself. So you need to pick your team, you need to get your team established. Now we're calling them Deans, just like a college. A Dean at a college, Dean at a university, they do help build up the training, they do help establish the syllabus. They may teach some classes, but that is not their exclusive role.

So we're calling this dean to help you encourage and build student life around these classes. To help you evangelize, to help you communicate with everybody, and make sure that what you are trying to accomplish is getting accomplished. It may depend on the size of your group, you may not have any Deans. You may be the only Dean, you may be the evangelist as well.

We broke our university-- everybody calls it a university internally-- we had four different groups. We had production, we had technology, we had code, and then we had-- I think we just called it student life-- it was just kind of general. And we had four different Deans for each

of those. So we had an overall education manager, and then the four different Deans. And those Deans were responsible-- we met quarterly-- those Deans were responsible for figuring out what classes needed to be taught, and then picking the trainers to teach that as well. It may have been the Dean, or it may have been somebody else who was much better at teaching that task.

**DONNIE**

**GLADFELTER:**

So building upon that, the program elements, we've said it probably a half dozen times already, but Help Desk trends. This is what your people are breaking, this is what they're crying for help for. And so if you ignore those in your curriculum, you are ignoring a large contingency of the people inside of your organization. And with that, I think the holistic piece here of the Deans that are focused on the different program areas of my education program. Going and really harvesting the treasure trove of information that I have internally-- and we keep on picking on Help Desk, because it's just the most obvious one-- but this plays directly into helping us identify what my classes should be.

Now at this stage of the game, this is not going through and saying, well, in my Revit class, I am going to do these different topics, or I need multiple Revit classes. It's not talking about this, this is talking about I need to achieve a certain objective around certain areas. So I need my team to learn basic project setup for Revit, I need my teams to also achieve a certain objective around Revit. And from there we can begin--

**JASON KUNKEL:** That's you.

**DONNIE**

**GLADFELTER:**

Is this me? Oh. From there we can begin building our program-- I thought we had that transition just perfectly laid out. But from there we can begin building our program. It's probably pretty obvious, you probably came into this class, assuming, yes, we have to build a-- we have to build our classes. But the bigger reason that we put this in here, is because notice where it in the stage. We're on the fifth virtue right now.

What we find so often with some of the programs that we've seen fail, is they jumped straight to this. They say, I need training, we need to get people spun up on Civil 3-D, so you know what, we're going to build a Civil 3-D class. And all of my Civil 3-D woes are going to be solved. And then six months later they come back and they say, why isn't anyone using Civil 3-D properly. So we have to build our program.

**JASON KUNKEL:** And likewise, once you build it, you've got to start it up. And again, we put this in as a specific

task so you know, you're going to build it first, you're going to ramp it up. You want to start it and you want to kind of maintain that consistency. Thing to keep in mind here when you starting up, it's not going to be perfect, it just isn't. And that is absolutely OK, your employees are going to understand that, they're going to accept that. And if you started to have that conversation with them-- and the managers understand the importance-- they are going to see this and just be grateful, and think this is exciting that you have taken this step to improve them, and make their jobs easier.

And then building on the imperfections, lather, rinse, repeat. Maintain your impact training schedules, maintain your meetings with management. If you schedule a class, unless there's a fire drill, have that class, be consistent. And then with that consistency, go back and see what's working and what's not working based on the metrics that you've established already. Don't assume you have that perfect class, go back and rebuild it. Find new trainers, find new content, future proof as much as you can, that's kind of a tricky part. But once you get your baseline structure, you want to start paying attention to what is going to be coming down the pike after people.

You want to try to guess and anticipate that new technology, or the new trends, or the new codes that are coming, and start building your classes around that.

**DONNIE**

**GLADFELTER:**

Absolutely, I mean we saw this yesterday in the keynote, right? That the auto manufacturers that focus just on combustion engines, they're getting left behind little bit now. So you have to begin anticipating what's coming down the pike. It doesn't mean that you're going to introduce it to your program today, but it should absolutely mean that you're beginning to plan for it. All right, so wrapping things up, we have about 20 minutes left in the class.

**JASON KUNKEL:** Nice.

**DONNIE**

**GLADFELTER:**

To sort of wrap things up. And I want to let you guys have the benefit of having two trainers, that have done this for at least a decade each, that you can bounce some questions off of. But as we begin taking a look at the story, or the sequence that we've put together here. First and foremost, when I'm beginning to stand up my training program, I've got to be honest with myself. The fact of the matter is, there are absolutely some areas that are going to be inconvenient to admit. Everyone is trainable is probably the big one that everyone comes up here with, being honest with myself.

If I'm not honest with myself, I'm going to sweep things under the rug, and to tie things back

into the keynote, I'm going to continue down the combustion engine route. Instead of really understanding where does my firm need to go. And speaking of that, I have to know the people that I'm training. I have to make sure that, what it is I built aligns with the way that they learn.

And then the big takeaway here, too, is the importance of that reinforcement. If what I put out there, what I build for my team, is not reinforced-- in all the tactics that we've expressed, in the virtues and the learning path itself-- if that is not reinforced at every step of the way, with those mileposts, then the chances of my program having longevity? It'll start with a big bang, and it will just fizzle out. It might take six months for that it might take a year for that.

And so much of ensuring that that longstanding burn out does not happen is to make sure that I build the best team that I can. This starts with, obviously, the people who are going to be conducting the training. But we have to challenge ourselves to think a little bit differently here, and think about the people who are going to be responsible for the success of the program. The Deans are such a critical element to successful training programs. They may teach classes, they might not, it doesn't matter. But what their focus is on is that I have a successful training program, that my training is indeed virtuous.

And then training is one of those things that people get lost with a lot within their organizations, right? We oftentimes have that idea that, you know what, I'm going to put this entire class schedule up on the internet, and people are going to go and pick-and-choose. They're going to be able to assemble the appropriate learning path, and they're going to come out intelligent with a PhD, and whatever it is that I'm trying to shove down their throats. But the fact of the matter is, unless you are cognisant of that human element-- the human element is so important to this, is such a PR as it is the tactic of actually doing training. Having that discussion, if you put it inside of your annual reviews, I think that's a really awesome timing of that discussion to have at an individual basis. One-on-one, this is how the company wants to help you grow. That's the message that you're trying to convey there. And this is how we are going to help you achieve that. Think about employee morale, think about the PR piece of that. And so we have to make sure that the people we're trying to teach, the people that we're trying to educate, know what their path is.

But beyond that, it goes upwards as well, right? Because if the people who are ultimately paying for this don't believe in it, it's going to die, just as much as if the people who are expected to participate in it, don't believe in it as well. And so every stage of the game, I have

to be able to articulate-- be honest-- what's going well, what's not going well. And the better you articulate that, the better be this idea of team comes in. And I'll let you--

**JASON KUNKEL:** I'll tack on to the team idea there as well. This is a tough chat, this is related to the Everybody Is Trainable idea, not everybody is trainable. On top of that, not everybody is a good trainer. The person who is the expert in the topic, may be terrible at teaching, you do not want that person teaching that topic. And that's a tough conversation to have, because everybody knows that Fred is really good at 3D math, but Fred's a jerk. We don't want Fred getting in front of everybody and trying to talk about things.

My brain flashes to the *Saturday Night Live* sketch, the IT guy, move! I mean that's Fred, we don't want him teaching these things. So you may have to invest time in getting your teachers up-to-speed close to Fred's level, so they can have that conversation in there as well.

Another thing you want to keep in mind-- and this was one of the hiccups we did, one of the problems we had where we were-- we relied too heavily internally. We assumed we had the experts. And then the time spent for our teachers to get up-to-speed, and become an expert, and teach that, it ended up being wasted. You want to look outside as well if you can, if you need to. You may have the experts there, that's great, but don't forget you can peek outside experts, and pull them as it is necessary. It adds a logistics complexity, but there's something good about having that anonymous teacher in there. So you don't have to lean on Fred too hard on that. Poor Fred.

**DONNIE** Fred is usually nice. All right, so what I like to do is open up the floor for questions, and  
**GLADFELTER:** hopefully, facilitate a little bit of a panel discussion here. Yes sir?

**AUDIENCE:** OK, management is on board for [INAUDIBLE] training. I work at a small group, I'm doing the training. I'm the new guy on the block, a year and a half. Everybody else, twenty plus. I have no authority there, because I'm new guy.

**JASON KUNKEL:** Yeah.

**AUDIENCE:** So management does not give me any authority on implementing.

**DONNIE** And are you trying to get to the point, or what are you trying to deliver? Is it the several day  
**GLADFELTER:** long class on whatever software it is that you guys use, or is it something else?

**AUDIENCE:** Just new techniques, and how to speed things up, how to make things better, how to

streamline things. But, like I said, I'm working in a really small group, and I'm the new guy and they don't want to come to work anymore. They don't want to learn new stuff, and I have no authority there, because I'm the new guy. OK, we've done this training, this is how we're going to do this program from now on, and people aren't doing it. They're doing it as little as possible.

**JASON KUNKEL:** So I'm assuming this is a technology topic? OK.

**DONNIE** And just real quick, for the benefit of-- I think they're recording this, too. The basic question  
**GLADFELTER:** here is, you're new to the organization, you see the vision, you see the power of training, but you don't have the authority to actually begin implementing it, and seeing it through.

**JASON KUNKEL:** And this may be a bigger challenge, I don't mean to throw more challenges on your plate with this. If it's a technology issue, I'd lean back on what Donnie was talking about with the standards. If you want to teach something, try to set up the technology in a way that the only way they can do it is the way you want to teach it. I don't know if you've got that interaction with your CAD manager, manager of IT, whoever.

But if you can be a little more clandestine, and kind of sneak around a little bit, and then they're like, why can't I do this? Oh, let me show you the way to do it. And then build up more one-on-one, and try to build a rapport that way. So it's more of a guerrilla tactic than a big, big class tactic.

**DONNIE** And to tag onto that real quick, actually the session I did last year was a one called Predictable  
**GLADFELTER:** Noncompliance, it was talking about CAD standards. And one of the big arguments that I had there was really thinking in two capacities. We think so often about authority being that contractual constraint of well, I need the authority, I need to have that contractual authority to actually tell you, you need to learn this.

But there's the social side as well, and this goes back into the PR elements of this as well. One of your first steps might essentially be to create those social contracts with the people internally. Don't try to go straight for the authoritative contract, but earn the social contract. I think that's essentially what Kunkel was saying as well.

**AUDIENCE:** Which is what I'm trying to do, but still I'm working with people that have been doing the same job like 25 years.

**JASON KUNKEL:** Yeah.

**DONNIE** Well and so, I mean at my old company, we were a much larger company, but my manager  
**GLADFELTER:** came in from the outside. We had our university, and in fact university had become such a black eye on the company, because our old training program just didn't have that-- it didn't subscribe to a lot of this. New guy came in, and again he had the craft of establishing a social contract very early. And it maybe took him six months instead of three months to actually start setting up the training program, or double the time that he thought he would be able to stand it up, but he was able to earn those contracts very early on and get that.

So we'll absolutely extend the tale of how long it takes you to implement things. I think you are the next one that had your hand.

**AUDIENCE:** I just want to say first very good content, thank you guys.

**JASON KUNKEL:** Oh, thank you.

**DONNIE** Thank you.

**GLADFELTER:**

**AUDIENCE:** And secondly, so this is really good for training, but what new product rollout? So for instance, we're looking at a new [INAUDIBLE] system, this is very good for setting up an employee on a career path and movement. But when you're doing a whole new rollout of the brand new program, do you guys have any suggestion for that? We've failed miserably in the past, we rolled-out BIM 360, and cut all of our foremen off from that [INAUDIBLE] without any training, and it was a disaster. We're looking to do the same thing with a document management system, but I'm trying not to repeat that same step.

**DONNIE** The question for the sake of people who couldn't hear on the recording--

**GLADFELTER:**

**JASON KUNKEL:** Repeat questions, got to repeat the questions.

**DONNIE** Essentially being you're trying to rollout a big piece of technology, in your case it happens to  
**GLADFELTER:** be a document management system, but this could very easily be a brand new release of AutoCAD, or Revit, or anything else. And how do you make sure that that is a success?

**AUDIENCE:** And we're a company of 350 people, so it's fairly large.

**DONNIE** I don't know where Kunkel was going on this, but I'll just say I would go to the blended piece. I  
**GLADFELTER:** don't know if that's where you were going?

**JASON KUNKEL:** Oh well I mean, always do blended. Yeah, I would find your champions of the software. You've got to get ahead of the game. Obviously you need to start training before it's rolled-out, but if you're 350 people, find the 10 people who you trust, who you think can understand it, and who you think will be excited by it. And then saturate them with training.

They're probably also the ones who are going to be able to hang on and retain that information before they need to get into it. You're jumping the gun a little bit, you don't want to get too far ahead, but if they're bright enough, they're going to retain and remember that. So get, it's not really your Deans of your group, but it's your Deans of your software, it's your Deans of this software rollout. Find a small group, find a core group you trust, get them trained, and you absolutely need to be structured on it.

We are rolling out a document management system now as well. But we've got-- the person responsible for their rollout is going to each office, we are getting a six hour training session, and we are tying in the end of the training session with actually doing some of it. We're going through our old files and rolling through it, and we do not officially have to start using it until March, I think.

**DONNIE** Right, if I'm trying to maybe articulate a formula for things-- and this is essentially what we're  
**GLADFELTER:** doing-- you think in the classroom training that's typically the best way to get a group of people up-to-speed on a topic. But I go back to, earlier in the slides, first the blended piece, but secondly the reinforcement piece. How are you going to reinforce that training after it actually occurs? And your answer to that might be different depending on what it is that you're trying to teach people to do.

I know, at my former firm, when we were doing our Civil 3D rollout, we of course provided a 3D training. But then we had our stream group that didn't do anything in the Fundamentals class, because streams, if you're familiar with Civil, are a whole beast. And so that had a lot of desktop reinforcement training that helped them get up to speed. So I would say focus on the reinforcement element, and figure out the blended learning.

Maybe it's-- maybe it's the full classroom class with a series of impact sessions after that, or maybe you have, what I to refer to as mentoring sessions, that you schedule at some sort of recurrence after the rollout. So it's just a two hour period of time that, whatever problems that

they're having, that they can articulate to whomever is the program manager of that, and get their answers answered quickly.

**JASON KUNKEL:** And one last thing to tack on there. If you're having trouble convincing management that this is important, you've got the best example right now. You just point back to your BIM 360 rollout and say, look what a mess this was, we need to do something different.

**DONNIE** OK, you sir.

**GLADFELTER:**

**AUDIENCE:** This one is [INAUDIBLE]. So the same thing is, you're trying to roll something out, it's how you schedule these trainings in? So I've got surveyors and the ITs, they're out in the field, and they're too busy to do any training. So we do training on part of the job, and they come in in the winter, and they don't have a clue of what we just rolled out, because they're busy going to the field. How do you schedule the trainings? Do you do multiple a year? Or do you just try to keep some kind of list of, OK, these guys have the training, these guys don't. Well, if they come into the office, and are like, what's this?

**JASON KUNKEL:** Right.

**AUDIENCE:** How would you structure that?

**JASON KUNKEL:** You've got to have your list, and that goes back to the learning paths. You know what people took what, and it could just be an Excel spreadsheet. You say, this person took this, this person doesn't need this.

When we were rolling out Revit at my firm, we had two years where every month, the second full week of the month, we set aside-- and it was dedicated and all the managers knew this was the time-- Tuesday, Wednesday, Thursday, this was Revit 101 training. And if somebody was going to start a class, or I apologize, start a project in that month, they were to go to that training. We might have had training for one person.

But it was official, it was structured, and it was consistent, everybody knew when it was supposed to happen. And it sucks a lot of time, it is a huge time sink. But in the end-- I'll pat myself on the back a little bit-- we had a really successful Revit rollout, because we kept it structured, and the management been knew this is important, this is when these things are happening.

**DONNIE** And just real quick, to repeat the question. The question there was about the scheduling of the  
**GLADFELTER:** class itself. Sorry.

**JASON KUNKEL:** It's my first time, all right? I'm learning.

**DONNIE** The piece I would go back to that, I think it was one of Jason's slides that he mentioned, that  
**GLADFELTER:** during that annual interview process, you're having that chat with the individuals. Hopefully, this becomes important enough, that that's as much a contract of the individual to the company, as it is the company to the individual. That, if you believe in us, we're going to believe in you.

And if it's important enough, maybe we delay the crews going out by an hour on every Friday, or something like that. Or we call them back into the office an hour early so that we can get that learning for them. Again, the dynamics are going to come back to you, but, in essence, what I hear in that question is that, to the people who are paying the bills it's not important. That's the message that gets conveyed in my opinion there. Yes sir.

**AUDIENCE:** What are your thoughts on targeted training versus in mass training? So I'm in a situation where about 1000 people have to get trained on a specific thing. And management wants as many as possible, as soon as possible. Where 75% of them won't be using whatever they're being trained on for up to a year.

**DONNIE** Right.

**GLADFELTER:**

**AUDIENCE:** My preferred track is, the people that are going to use it, I'll give them training, then they can take that training and apply it, so it sticks. And my management seems to think in reverse, we just give them training, a year from now, they're going to know it, down the-- a year from now. So what are your thoughts on that?

**DONNIE** So the question being-- or were you going to do it?

**GLADFELTER:**

**JASON KUNKEL:** No, no, you got it, man. I was waiting.

**DONNIE** So the question being, you've got a very large group of people, in your case it's about 1,000,  
**GLADFELTER:** that need to get trained. And management is pressuring you to train everyone right now, and how do you combat that?

My argument to that, I would agree with your notion that, it sounds like you have some pilot groups within the organization that are going to be using it immediately. I would absolutely recommend, do the classroom training for them. But I think this is where that blended approach can really pay dividends to an organization. So you're doing the classroom training anyway, now I would say, do not just take a video camera up and record it. But I would say record it into five minute segments, and put that into some sort of online learning management tool.

A lot of the vendors who offer it will let you post your own content in there as well. Or you might have one internally as well. I'm not going to worry-- concern myself with how that's facilitated. But what at least does is, as the team-- as other teams come on board in an unexpected schedule, they at least have the knowledge available to them. It might not be the best delivery platform, but they can at least get their answers answered in an immediate fashion.

So with that, I would encourage you to have some sort of reinforcement after that. And what you may very well do is, once you train your initial group of champions, you have the online training that people can go to, but you end up with some sort of recurring public square kind of forum. That as new people come on board, I know that every Friday, I can dial in to get the questions answered in an immediate fashion.

**JASON KUNKEL:** And I'll be more direct, you're going to waste those people's time. They will absolutely-- and they know it, that's the thing, they know they're going to have their time wasted. We do classroom training, and maybe one every 10 person comes in and said, oh, I took this class two years ago, but I didn't have to use it. So now I'm paying the X hundreds of dollars again. It is a waste of time, a waste of money.

Donnie, we want to go to the next slides just so they can have that? We're getting close.

**DONNIE** Right, so we're at 58 after.

**GLADFELTER:**

**JASON KUNKEL:** Another maybe one, two more?

**DONNIE** So you sir?

**GLADFELTER:**

**AUDIENCE:** So it's kind of leaning towards your Everybody Is Not Trainable, and then I think you had mentioned, Everyone Shouldn't Train Like You. We have a firm that we've acquired.

**DONNIE** OK.

**GLADFELTER:**

**AUDIENCE:** And as a whole, we're struggling with the resistance from that from to following our existing guidelines and standards that we've established since before I started. So I found the champions that you taught this to help me encourage people that it's not something we're forcing them to do. It just so happens that the champion now is also one of those people who, everything you do, they want it to be different. So I'm having to fight with forcing people to do it according to our timeline coming up.

The issue that I'm running into is, as a culture, we don't make people follow [INAUDIBLE] I really do, but so I'm trying to figure out, how do you deal with that when you're talking about training schedule. Because, I will go to the office, and I've done this, I've gone out to that office and gave training for that group. And then weeks later come back to find out that they've totally off to do something completely different.

**DONNIE** So the big question here, to repeat that, was you have a group of individuals, in your case it was through acquisitions, but I've seen this play out many times over in non acquisition standpoints. And they want to do it their way, and that is counter to the way that the company has stated that it needs to be done. My initial response to that, is that's more of a standards discussion than it as a training question.

**GLADFELTER:**

The standards itself have to be agreed upon first, and that's one of the reasons that I say standards and the how-to training are two separate discussions. Beyond that though, it goes back to the PR pieces, in my opinion. That you have to establish that social contract with those individuals, that you're coming across not as, this is the only way and this is the law of the land. But begin earning those social con-- the social piece by having the discussions.

And if you can just change one or two things, it will go such a long way in bestowing ownership of the standards to that new group. That it's not just, this is the steady fast way that it is, and it has to be that way. But if you can kind of throw them a bone, you can start earning that contract a little bit.

**JASON KUNKEL:** We went through three merges back in my old firm. And we were the big guys, and everybody

was supposed to do it our way. And it was a multi-tiered approach, and it took a couple of years for one of those firms to be on board. Management was critical, unfortunately. I know our guys wanted-- oh, the project managers can make their own decisions, they can do what they want, they know what's best. Then they, no, they didn't know what's best.

We were a 300 person firm, we need to get things done. I had to lean on management heavily. On top of that, I-- tacking on to throw-a-bone-- I had to do a little compromise. We had to show good faith, and I found the safest things that they were doing, we adopted those things. So it looked like there was a bit of a give and take in the merge, when really in fact it was just one or two things that weren't really a problem for us to adopt.

And it made it easier for them to start adopting the things that we needed them to adopt at that point. So, it's kind of a PR move again, little sneaky, but you got to be a little sneaky sometimes.

**DONNIE** It's about the human element. So I will say that we are at 12:01 right now, so if you need to get  
**GLADFELTER:** going, by all means. Jason and I-- what that?

**JASON KUNKEL:** 9:01.

**DONNIE** Oh, 9:01, sorry. Our computer is still on east coast time.

**GLADFELTER:**

**JASON KUNKEL:** Thank you all, very much, for coming out.

**DONNIE** If you need to go--

**GLADFELTER:**

[CLAPPING]