On-Job-Training in the Back-Office Business

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On-Job-Training, also referred to as OJT, is a critical phase in the learning curve of a new hire in any business. Developing and deploying a structured OJT program is the key differentiator in any business when it comes to knowledge and skill of the working associates.

This document discusses the intricacies involved in the design of an OJT methodology / approach that is important for any business.
Introduction

At Wipro BPO, trainings are conducted in phases and each phase aims at developing a particular competency. The various training phases comprise of:

- New Hire Training
  - Induction
  - Pre-Process Training
  - Process Training
  - On-Job Training
- Refresher Training
- Remedial Training
- Development Training

New Hire Training

New Hire Training is carried out in four different phases – Induction, Pre-Process Training, Process Training and On-Job Training. Training is typically instructor led (in most of the business processes) and focuses on classroom sessions, group activities, role plays, demonstrations and hands-on practice. The image below highlights the salient features of each phase of training.

This document focuses on the “On Job Training” area and highlights the key aspects that should be considered while designing the “Right OJT Program”.

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**Phases in New Hire Training**

<table>
<thead>
<tr>
<th>Induction</th>
<th>Pre Process Training</th>
<th>Process Training</th>
<th>On Job Training</th>
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</table>
| • Introduction to Wipro  
  • Vision, Culture, Mission  
  • Wipro Values  
  • Quality Awareness | • Accent Neutralization  
  • Culture Sensitization  
  • Customer Service  
  • Keyboard Skills  
  • Effective Communication Skills (Written and Spoken)  
  • Telephone Handling  
  • Industry Orientation  
  • Client Orientation | • Process-specific Knowledge and Skills  
  • Process Certifications  
  • Process based Knowledge and Skills | • Buddy System  
  • Calibrations  
  • Controlled Calling  
  • Parallel Run  
  • Focused one to one Feedback & Coaching  
  • Group Huddles  
  • Process Updates  
  • Product Updates |

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Understanding On-Job Training

On-Job Training (OJT) is normally included as part of the New Hire Training, post completion of Classroom / Buddy Training. In most businesses / accounts (back-office business) in Wipro BPO, an OJT program exists but not in a structured form. In most cases it does not factor in / include all the critical components to help make a new hire successful at the start of their Job.

This document helps in identifying the key ingredients for an OJT program which will help shorten the learning curve cycle time for the new hires. This document also discusses and analyzes the different OJT methodologies and approaches to help in understanding the differences between an OJT and SOJT (Structured OJT) program.

Note: The term SOJT (Structured OJT) has been taken from the “Whitepaper on Structured On-the-Job Training and Its Value to High Performance Manufacturing” by Richard Doss, RWD Technologies.

Definition of Training

The term training refers to the acquisition of knowledge, skills and competencies as a result of teaching vocational or practical skills and knowledge that relates to specific useful competencies. People within many professions and occupations may refer to this sort of training as professional development. Some use a similar term for workplace learning to improve performance - training and development. On-job training takes place in a normal working situation, using the actual tools, equipment, documents or materials that trainees will use when fully trained. On-the-job training has a general reputation as being most effective for vocational work.

Definition of OJT

OJT is defined as “employee training at the place of work while doing the actual job”. Usually a professional trainer (or sometimes an experienced employee) serves as the course instructor and employs the principles of learning (participation, repetition, relevance, transference and feedback) often supported by formal classroom training. In the BPO industry, On-Job Training is scheduled post completion of Classroom Training. During Classroom Training, the new hire understands and learns the theoretical concepts and procedures. During OJT the new hire is expected to “buddy-up” with the SME / L2 / Buddy / Floor Trainer / Training SPOC and performs transactions on live systems under supervision / in a controlled environment.
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Problems / Challenges Faced

On-Job Training in the context of this document is “Training scheduled post completion of Classroom / Buddy Training or Conceptual Training”. OJT refers to training on the floor in real time environment with adequate support and guidance. Traditional unstructured OJT training methods have some advantages and disadvantages as described below:

Advantages:

- **Low cost** – Does not require the development of potentially expensive training materials or classroom/computer-based instruction
- **Task-based** – Since OJT is performed at the work area, training tends to be focused on performing real job tasks
- **Well suited for small groups** – OJT is often the most practical training method when you only need to train one or two employees at a time.

Disadvantages:

- **Inconsistent** – Traditional OJT relies heavily on an experienced employee to provide instructions based on what they consider most important topics. What is important to one employee may not be important to another. The result is what is learned may vary greatly, depending on who is assigned as the trainer
- **Incomplete** – Without a structured lesson guide, OJT trainers often forget to cover important information. What is learned is likely to be based on what happened that day rather than on what a new employee needs to know to be safe and productive
- **Lack of founding principles** – While the hands-on aspect of OJT may appeal to the practical learner, often the underlying theories of operation are not covered in sufficient detail or accuracy. Without this foundation of knowledge, trainees often learn what to do, not why they are doing it, resulting in poor decision making when things don’t go exactly right
- **Bad habits** – The trainee observes and may adopt the trainer’s habits and attitudes about all aspects of the job including safety, quality, customer service and relationship with management. Poorly selected trainers can have many unintended consequences
- **Unstructured** – Since the OJT program does not have a structure, it has high dependency on the trainers availability for sessions; in the event of high business volumes, the trainee is toggled as the trainer does not get time to conduct the sessions due to operational aspects which leads to low trainee morale and eventual extension of OJT program

Most the OJT models / approaches observed while studying different processes in the back-office business at WBPO focuses around a combination of Training and Hands-on experience clubbed together as a part of OJT. However most of the critical questions are not clearly answered by the OJT programs rolled out in the current scenario. Questions such as:

- Is the current OJT program the best approach which helps a new hire understand the process?
- Are new hires taking longer time to come up the learning curve?
- Do the new hires learn by repeating the same mistakes / errors?
- Varied knowledge / performance levels of New Hires post completion of Training
Most of these questions are unanswered in OJT programs which are currently being rolled out in the back-office business because of the following key reasons:

- OJT programs lack standardization
- OJT programs do not integrate all the critical components for the new hire to be successful in their role
- Robust control mechanisms do not exist in the OJT programs
- Floor trainer bandwidth issues
- Most of the OJT models indicate a very open OJT structure which are not clearly defined
- Learning path for the new hire has high level of people dependency because of lack of standardization
- A robust and comprehensive OJT program would address these operational / business issues

Proposed Solution

Before we discuss the proposed solution, it’s important to understand the approach / methodology one should adopt while designing any training program. Let’s look at some of key elements which should be kept in mind before getting into the design phase of any training program.

The best method of training delivery can only be determined by conducting a thorough need analysis. Sound instructional design requires us to analyze the following aspects:

- The training audience
- The learning objectives
- The skill level of the audience
- The difficulty of the subject matter
- Competency-based approach to training

Competence can be defined as “the application of skills, knowledge and attitudes to tasks or combination of tasks to standards under operational conditions”.

The challenge of building a new employee training program or improving an existing program can be a daunting task for any training function or professional. Often plans are made without full understanding of the organization’s overall business goals and objectives. The end result is a “one-size-fits-all” training curriculum or program that is too limited in scope to impact business results.

It is strongly recommended to stakeholders that they view the employee training and development programs from a strategic perspective, utilizing a competency-based training approach that focuses first on understanding the goals or business objectives of the organization and the account. Once the overall objectives are understood, one should then work to identify the skills and behaviors employees will need to achieve those goals.

With competency-based training, expectations about levels of performance and individual achievements are clearly communicated. Competencies serve as a framework to indicate behaviors and skills that are seen as most valuable to the organization. Employees are provided a clearly defined roadmap to guide them in the development process. Because core competencies and skills necessary for optimal performance and organizational contribution are plainly identified, competencies serve as a
framework for multiple areas of the talent management process in addition to training and development – such as performance review and career counseling.

Competency-based training is a systematic platform for learning and organizational development. Let’s look at some of the key actionables while we design a competency based training model for the business:

### Identifying and Establishing Core Competencies

Regardless of the training initiatives or target group, a critical step in any development program is establishing a list of core competencies. While business strategies set the stage, competencies serve as a framework for the training program – mapping groups of specific skills and behaviors that an organization strives to instill and develop in the target group or individual employee. These competencies can be very specific to the organization, its processes and goals. Let’s look at some of the questions which one should ask while identifying the Core Competencies:

- What characteristics and capabilities are critical to the success of the organization’s overall mission and goals?
- What are the common traits and strengths shared by top performers?

These are the types of questions that need an answer in order to establish a list of core competencies unique to an organization. These competencies will serve as a standard by which employees will be measured and evaluated. A simpler way is to break the process down into roles and further into tasks and subtasks. It is important to map the competencies to these tasks.

This detailed activity would ensure that all the knowledge & skill requirements are captured for the role and eventually for the process. Identifying core competencies by process and job role will assist in the hiring process and will also guide in terms of promoting and compensating those who have met and exceeded the organization’s standards.

### Defining the Measurement Criteria

The next step is to define the measurement criteria for performance improvement. This helps in tracking if the desired result has been achieved, if each performance outcome has been met and how well the overall outcome has been met. Once it is known exactly what the goals are, the measurement criteria can be defined for the desired outcome. The measurement criterion has to be both quantitative and qualitative in nature.
Competency Mapping to Create Individual Development Plans

There is a growing trend to customize training and development at an individual level – creating specific learning paths unique to each learner’s own strengths and weaknesses. With individual development plans, it is easy to target specific gaps and challenges – so that each participant involved in the training and development initiatives is able to dedicate their efforts to areas where skill gaps and challenges exist.

Competency mapping allows organizations to identify an individual employee’s strengths and weaknesses in order to provide a conclusive and honest picture of where each employee’s current skill gaps exist and providing the employee’s with clear directions towards a career development plan. Competencies are grouped in skill areas such as customer service, leadership, decision-making, communication and teamwork, in addition to the skill and domain knowledge competencies. Competencies are mapped to relevant training interventions to create a learning track to guide employees towards achieving competency in a particular sequence and skill area.

Monitor and Track Individual Development Plans

Once the individual development needs for the new hires have been identified the next important step is to provide support to help them meet the job based competencies and behavioral / developmental competencies. A formal quarterly review process needs to be implemented to monitor the progress and support provided by the supervisor to help the new hire evolve as a true professional.

Learning Styles

Understanding the learning styles of the target audience is critical while designing any training & development program.

Felder and Silverman's Index of Learning Styles

One of the most widely used models of learning styles is the Index of Learning Styles developed by Richard Felder and Linda Silverman in the late 1980’s.

According to this model (which Felder revised in 2002) there are four dimensions of learning styles. Let’s think of these dimensions as a continuum with one learning preference on the far left and the other on the far right.
Once it is known where the preferences lie on each of these dimensions, it is possible to stretch beyond these preferences and develop a more balanced approach to learning. This significantly improves the effectiveness of learning.

Some of the key elements that are required to build a structured On-Job Training Program are listed below:
Structured and Well Defined OJT Program

OJT models are rolled out so that the new hires undergo a standard and structured learning path, which helps them progress on the learning curve faster. During OJT the new hire would buddy up / shadow with the floor trainer / SME and understand the hands-on case processing as per the On-Job Training matrix for their track / queue and also processes cases (assisted / hand hold by the SME).

OJT durations should be defined based on the complexity of the process and the expected competency & skill levels from the new hires. In addition, one should also look at historic data (if available) to analyze the learning trends of new hires and based on these findings the OJT duration should be decided. The Key measurable parameters during OJT should be a combination of quantitative and qualitative aspects:

Quantitative Targets

One key parameter that revolves around minimum number of cases to be processed on a week-on-week basis during OJT is quantitative targets. The number of cases increases as the trainee progresses in OJT. The number of cases might vary from one track / queue to the other on a week on week basis the complexity & the nature of the job.

Qualitative Targets:

The type of case a trainee processes during OJT (week-on-week) is clearly defined for every track / queue and it progresses from simple to complex type of cases to provide the trainee with adequate learning opportunities. The second qualitative parameter is the quality score / transaction monitoring score on the audits done by the quality analyst (QA) or the SME and the team lead. The expected quality percentage is defined in the OJT sheet for each work stream for the type of case the trainee processes. The quality percentage or the accuracy percentage increases as the OJT progresses. Below is a sample of the OJT qualitative and quantitative parameters:

<table>
<thead>
<tr>
<th>OJT Week-1 (Sample)</th>
<th>Day-1</th>
<th>Day-2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Names</td>
<td>No. of Cases - Planned</td>
<td>No. of Cases Processed - Actual</td>
</tr>
<tr>
<td>Name 1</td>
<td>5</td>
<td>75%</td>
</tr>
<tr>
<td>Name 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name 3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Suggested split of mix Case Types (mention names of Case Types)
XYZ Updates – New Joinee’s Report

<table>
<thead>
<tr>
<th>OJT Week-4 (Sample)</th>
<th>Day-1</th>
<th>Day-2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Names</td>
<td>No. of Cases - Planned</td>
<td>No. of Cases Processed - Actual</td>
</tr>
<tr>
<td>Name 1</td>
<td>20</td>
<td>90%</td>
</tr>
<tr>
<td>Name 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name 3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Suggested split of mix Case Types (mention names of Case Types)
All Types of Cases
Conclusion

- Adults (following the principle of “Pedagogy”), learn best when they are “trained” while at work, instead of long hours in the classroom. The classroom should be limited to sharing conceptual understandings only.

- Every learner has a specific learning need which has to be identified and targeted for improvement such that it is aligned with the targets of the business/account. The focus has to be on individual development plan as a part of the OJT.

- Generic “macro” training needs to be fine tuned by empowering coaches, trainers and managers such that individual needs are addressed.

- Practical solutions which are fast, effective, not resource hungry and have long lasting effects are necessary. A robust control & measurement process needs to be in place to accomplish this as suggested in the document.

- Behavioral aspects play an important role in the successful execution of a job. However, our “excel worksheets” do not include this vital component. Hence, all aspects of behavioral training/reinforcements need to be emphasized during classroom as well as OJT phase.

- Enable and empower the floor trainers to help them excel in their training responsibilities.

- The training & OJT plans should use a combination of learning styles to help the learner understand the subject in totality beyond just the transactions.
Appendix

References

Site References

- BizLibrary – Online training for small & mid-sized companies. Website: http://www.bizlibrary.com/
- MindTools – Excellent skills for an excellent career. Website: http://www.mindtools.com/index.html

About the Author

Vinay Kumar Pareek leads the training function for the HRO & Supply Chain Management Tower in the Corporate Business Services (CBS) unit of Wipro BPO. He has over 10 years of experience in the IT and ITES industry, of which seven years have been in the training domain.
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