Cross-Training the Next Generation of Association Leaders

Introduction
The cross-training of high potential leaders and even front-line workers has been a mainstay in corporate America for decades. It was indeed the early form of Knowledge Management and Intellectual Capital building, long before these terms became recently popularized. Of course, cross-training in a large organization or multi-national corporation is usually co-coordinated through centralized management and supported by "head office" organizational development resources.

In the association sector, with its many small organizations, their independent Boards, and scarce training budgets; the concept of cross training might well be seen as a "luxury" – beyond the reach of many associations. However, this doesn't necessarily have to be the case.

Most organizations today realize that their future success is directly dependent on the quality, sustainability, and competitiveness of their *intangible assets* - the minds and capacities of their people and organizational systems.

Whereas the tangible assets (bricks and mortar, equipment, vehicles, etc.) have relatively finite applications and roles; the minds and capacities of our people should have infinite applications- through ingenuity, creativity, innovation and learning.

Recent research[1] is showing that the "value" of most organizations today is generally 75% due to its intangible assets.

Intangible Assets

Human Capital – Leadership, ingenuity, solution building

Structural Capital - Organizational systems, databases, inventions

Customer Capital – Strength of relationships with members, clients

Social Capital – Relationship and respect from community, government, industry

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Knowledge Management has unfortunately become one of those buzz-words of management-speak. Personally, I prefer the more advanced concept of Innovation Leadership popularized by Debra Amidon and ENTOVATION International; however, Knowledge Management has become the more universally used term.

At the fundamental level, Knowledge Management (KM) is as simple as sharing one's knowledge of tricks/tips about MS Word or PowerPoint design. KM can also involve cross-platform and back-up knowledge so that a manager knows how to use the desktop publishing software of her assistant in case the assistant is absent the day a proposal is due. Meanwhile, the assistant knows enough about member/supplier relations, how to work with the Finance department, and the prioritization of I.T. projects so as to keep initiatives moving forward in the absence of the manager.

Further, KM includes the successful sales approaches and service configurations that led to a high value contract in California, being shared with the Washington/Toronto offices so they can adapt these approaches to their market and successfully land similar contracts in their local areas.

At a more advanced level, KM is about the organization's ability to continuously innovate and create value for the community it serves. One of my colleagues, Hubert Saint Onge[2], describes Knowledge Management as:

> "The creation, exchange and harvesting of knowledge to build the individual and organizational capabilities required to provide superior value for customers.
>
> This includes:
> - Exploding competencies through continuous learning
> - Matching the pace of change of our environment
> - Generating new opportunities for the organization before the marketplace has discovered they are required."

(These are the same objectives as good cross-training initiatives.)

Strategic Capabilities refers to the assurance that your organization has at the front-lines, the people/systems/product ability to deliver on the expectations of the member/customer at any given point in time.

Behind the scenes, this has to be a key priority of senior leadership! You must be constantly building, refining, reinventing:
- People competencies (via training, recruiting, performance management)
- Organizational systems (via I.T., process re-engineering, software, alliances)
- Product/service offerings (via continuous innovation, project lifecycle reduction, collaborations)

Good cross-training can provide the stimulation for this building, refining and re-inventing!

The Ability to Learn and Grow – both by leadership team members and all employees – it is an important component in all the preceding cornerstone concepts. This takes commitment, focus, time and money.

Standard approaches such as reading books and taking course have been augmented today by DVD-based learning, surfing the web, chat groups, E-learning forums and more. However, cross-training remains a powerful way to step outside one's "rut", explore new patterns and contexts (key basis for stimulating innovation), and provide added value to the organization at the same time as being stretched into new personal leaning.

A disturbing trend through the nineties was a noticeable ever decreasing commitment to both time and money for employee training. A one-day "quick-fix" seminar simply can't replace a 5-day knowledge, competency and application development experience. The former frankly is 'window dressing' for a corporate statement, the latter actually delivers meaning advancement in organizational capacity and capability. While time is understandably precious, "1-day wonder" seminars are generally a waste of time and money.

For organizations and their people to truly learn and grow, time and space must be committed; but also expectations of improved performance and outcomes provided by the employee should be clear up-front.

Cross-training has many different looks. So, before we apply these principles to the Association environment, let's look at some corporate case examples, to learn from their leading practices.

CASE 1 – Sun Microsystems

A few years ago, Sun Microsystems (headquartered in Palo Alto, CA) was a company of over 60,000 employees, exploding towards 100,000 worldwide. Recent challenges to all Silicon Valley companies have caused significant retrenchment, but the following cross-training systems are still very much in place, and still guiding their strategic decisions.

First, Sun has a web-based system for collecting data on their 900+ Senior Managers and Executives. This database includes:
- Results achieved over time
- Learning agility – an outline of the programs, special projects, etc. in which they have been involved.
- 360-degree Assessment results over several years, against 23 key competency areas
- Willingness to do what it takes to move ahead (i.e. make the sacrifices of senior leadership, relocation, etc.)

Second, and most impressive, Sun has developed a summary of "experience factors". Each manger is rated on their experience (void, limited, extensive) against a list of key leadership experiences (i.e. sales management, technical division leadership, regional office leadership, etc.) These leadership experience elements are profiled for various "jobs" and ranked in importance for job effectiveness.

When new opportunities arise, Management can assess the job vacancy against the pool of up and coming leaders – their competencies <u>and</u> experience bases. From a career coaching and succession planning standpoint (and now a restructuring/downsizing) these databases and profiles are both strategic and prescriptive tools to guide cross-training.

CASE 2 – Pan Pacific Hotel

The Pan Pacific Hotel in Vancouver Canada, is no ordinary hotel! Not only do they have one of the most unique building-structure skyline features, their people have an absolutely amazing ability to think ahead about your needs and deliver what you are thinking about – before you ask!

Hospitality industries are renowned for hourly staff that turn-over quickly, and have little loyalty to the property at which they work. At the Pan Pacific however, they experience low turn-over, and a high degree of inter-functional co-operation communication and problem solving. They have a cross-training program to ensure that for example, hourly staff in banquets, are cross-trained for front desk or front-of-house roles. This provides a more flexible work force for the hotel, but also provides a 'win' for the employee that now has access to more hours of work. This in itself, isn't all that unique in the industry, so there must be something more going on!

As it turns out, management at the Pan Pacific put an unrivalled passion for and emphasis on cross-training, and it starts the day you are hired. There is a 4-day mandatory orientation to the organization, its philosophies, mission, values, etc. Next, new recruits are given 5 days of 'on-the-floor' training by an experienced mentor before they are allowed to go solo.

Behind the scenes, Pan Pacific has data-based the standard operating procedures for all positions and processes in the hotel. They have codified and made formal the knowledge about each position as a reference for all new recruits. Next, they have appointed a 'trainer' in each department and run them through 'train-the-trainer' sessions. This way, the wisdom and experience of accomplished staff, is sure to be passed down to new hires.

Finally, there is a genuine effort by managers to empower every worker and give them the tools needed to 'exceed expectations, and care for the customer without compromise'.

CASE 3 – CELESTICA

Celestial is a spin-off of IBM Canada, headquartered in Toronto that builds components, circuit boards, etc, for name brand computer companies. They have offices and manufacturing facilities around the world.

As a company, they have placed a high priority on Values (people, partnerships, customers, quality, teamwork, empowerment…) Their passionate culture has also driven repeated studies of their processes, systems, and carefully honed performance measures for each unit in the company. These performance measures are tracked and analyzed monthly.

If a unit starts to experience difficulties in one or more measurement areas, and this continues for 3 months in a row, a cross-functional/cross-geographic task team is assembled. Leaders from other parts of the company are dispatched to help the leader/team of the troubled unit by sharing their knowledge and expertise, and helping to evolve a solution.

The organization and all individuals benefit from this cross-training, task-force, knowledge-sharing approach.

Applying Cross-training to Associations
The basics of cross-training can be accomplished in any association of any size, simply by giving it some time, priority and attention by the senior leader(s). It can be fostered amongst front-line staff, department managers, and senior leaders alike.

One way to start, would be to identify for each position the "mission critical" roles and the knowledge/experience required for these roles. From this inventory, the team can identify one or more back-up team members for each role. Next a "cross-training day" could be organized with reciprocal tutorials done by all employees. Next, monthly sharing sessions over lunch could be arranged, building both knowledge interchange and team morale.

More advanced cross-training of senior association leaders is likely to require inter-association co-operation and co-ordination, but not a lot of cost.

Benchmarking – the process by which one organization identifies leading practices in other organizations in functional areas such a Finance, I.T., Member Relations, Training/Education, then assesses their owned performance against this analysis, is an excellent approach for cross-training at senior levels.

Associations need to be open to sharing their practices with others for cross-training initiatives to work in the sector. While there is some initiative required by the individual looking to do benchmarking/cross-training, the actual expenses are minimal, (A combination of the soft-cost of time plus hard costs of travel). An excellent approach to both solidify the learning and maximize the benefit of such an initiative, is to have the leader present to his/her colleagues the results/insight gained from the benchmarking.

Finally, a group like CSAE or ASAE could take some learning from our case examples and provide:
- A date-base of Association Senior Leaders/Functional Mangers with an assessment of competencies and summary of experience components.
- Assembly of cross-Association task teams to assist with request for help from an Association Board or CEO facing an operational challenge or crisis.
- Function-specific sharing sessions for senior leaders from various associations to highlight leading practices.

Conclusion
Cross-training initiatives need not cost a lot of money. However, they can provide HUGE pay-back through:
- Increased relevancy and professionalism of association leaders
- Improved performance and cross-pollination of leading practices into the day-to-day operations of many associations
- Enhanced networking, relationship building and pattern recognition – all leading to more creativity and innovation in our association leaders.
- Improved career broadening, and higher levels of loyalty from key staff.

As an Association Executive, you may just want to consider including a cross-training initiative as part of the coming year's Business Plan and management priorities! The return on investment can be significant to the organization, and the inspiration level of your people is likely to be ratcheted up a few notches as well. Enjoy!

Footnotes:

1. **"Invisible Advantage – How Intangibles Are Driving Business Performance**" – Jonathon Low & Pam Cohen Kalafut – Cap Gemini/Ernst & Young

2. **"What is Knowledge Management"** – Hubert Saint Onge – www.knowing.com/saint-onge/

3. Case Examples based on personal interviews of Senior Leaders in these companies, and extended tracking by Doug Macnamara

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