

## *The Staff Development Process*

Generational discussions about staff productivity, culture and drive have been a hot button topic for a long time. Statements such as “These young people are lazy” or “Back in my day we knew what was expected” are found throughout discussions at conferences and meetings. Each discussion leading to the conclusion that every new generation has a poorer work ethic than the previous one will soon lead us down a road of destruction. Siegfried Engelmann, a developer of the direct instruction approach which took a Houston school from a failing grade to ranking as one of the top schools in Houston, is quoted as saying “if the student is not learning, the teacher is not teaching.” This statement removes the stereotypical, subjective, labeling that happens when a person is not doing what they are “supposed to” do. And, it places the responsibility of providing the ability to learn on the teacher. This line of thinking lends itself to staff training and development, putting the emphasis on the processes your firm has in developing the people within your organization. Here are four recommendations for developing a formalized new hire training and staff development process.

### *The New Hire Packet*

Most organizations have a new hire packet giving a new employee important information on policies and procedures. However, very few companies provide a new employee with much more than that; the employee is left to fend for him/herself when it comes to what they are actually supposed to do as a new hire, whom they should meet, or even what exactly the organization does. To help alleviate this issue and bring the new employee up to speed faster, develop a form with the following items to be included in the new hire paperwork:

- *Assign a coach*- this should be their go-to-person for questions and help for the next few weeks. The coach should be someone at the same level or one level higher than the new employee. This strategically places the new hire in direct contact with someone that may have asked the same types of questions when they were hired.
- *Meet key players*- A list of key firm personnel should be provided and the employee will be required to schedule a meeting with each person. The list should include: Managing Partner, HR Director, other Partners, Marketing Director, direct reports and anyone else that plays a key role in the organizational process. During the meeting each person should tell the new hire what he or she does and how they can be of assistance to the employee. These meetings can be informal like over a lunch or during a break. The point of these meetings is for the new employee to connect with firm personnel.
- *Division/ Niche introduction meetings*- No one can describe what the firm does better than the person in charge of each division or niche. Provide a list of each division and/or niche manager. These may or may not be the same people he/she has already met with; however, the purpose of the meeting is different. Have the employee schedule an hour formal meeting for that person to describe what they do and what it means for the firm. Provide brochures and other reading materials for the new employee to review at a later time and use as a reference.

This process should be priority number one for all new hires and he/she should be given a deadline of no more than two weeks to complete (depending on the number of people he/she will need to meet). This allows them to immediately connect with key personnel as well as develop a better understanding of the firm. Putting them in control of these meetings immediately gives the new employee ownership of his/her career.

### *Expectation and Vision*

New employees can easily get swallowed up by the mundane. To prevent this from happening, sit down your new employee and ask him/her, “What do you want to do in the future, both short term and long term?” Allow the employee to describe their vision for the future and use this information to mesh with the firm’s overall strategic vision. Does the new employee want to become a manager or partner, open up his/her own firm, or develop/work in a niche? Once you understand a final goal for the employee, use the information, along with the firm’s strategic vision, to develop an appropriate career path. This should look like a process map for the employee’s career with defined positions. The next step is to define the expectations to be eligible for advancement to each position. These expectations could be technical skills, soft skills, business development training, software mastering, or anything else to develop that person for the next position.

### *Individual Strategic Plans and Feedback*

Now that you and your new employee have defined expectations and there is a clear path for advancement, it is time for the employee to take ownership for his/her success. An individual strategic plan is an individual development tool that defines the person’s goals for the next year. An individual strategic plan should have four to ten goals derived from the defined expectations as well as other tasks important to the development of the person and the firm (e.g. firm committees or special projects). The individual strategic plan should be tied to bi-monthly or quarterly accountability feedback meetings. This allows the employee to know exactly what he/she should be working on and how they are doing on each task within the firm.

### *Provide Resources*

One of the biggest complaints I hear about younger employees is their lack of basic knowledge in completing the work. I am unqualified to make assumptions on the coursework and teaching in business/accounting programs. However, the solution is relatively easy to set up and maintain. Develop a workflow/white paper that details a self-guided training program using exemplary work for common tasks within your firm. This can be done using hard copies or online, and should be setup in a similar format having:

- A blank document that will be the finished product (i.e. tax return)
- The same document fully completed and 100% correct
- All of the information to complete the assignment
- A process or outline for completing the product

This will allow the person to quickly learn how to accurately complete work and do it on his/her time. Other resources include excel training courses and e-learning courses.

People are not born knowing what will be expected from them throughout life. Each new change in life offers an opportunity to learn; however, it does not teach the new information. It is your responsibility as a leader in your firm to provide a process for learning. By providing a structured learning process your employees will develop faster, making them more profitable. Providing ongoing expectations and feedback allow each employee to know exactly what's expected and how he/she is doing within the organization. With this structured staff development program, your firm will create a culture of learning and growing your people, as well as improving your firm's success.

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