



BUILDING BUSINESS ACUMEN FOR TRAINERS

**Skills to Empower the
Learning Function**

Terrence L. Gargiulo

with
Ajay M. Pangarkar, Teresa
Kirkwood, and Tom Bunzel

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For today's trainers, knowing your trade is simply not enough; you must be equipped with a full set of basic business skills. This guide is designed specifically for today's professional trainers, allowing them to apply what they learn right away. It demystifies the language of business with practical advice, showing how to build strong partnerships with a business to help it achieve its objectives. Interactive tools, case studies, self-assessments, and exercises all help training professionals move beyond the classroom and fine-tune their business acumen. The book is split into sections focusing on:

- Financial skills
- Partnering skills
- Communication skills

Praise for *Building Business Acumen for Trainers*...

"The topics explored throughout this book bring much-needed knowledge to learning-industry professionals in a pragmatic, yet highly informative manner. The timing of this volume could not possibly be better for learning professionals seeking to communicate the important bridge between organizational learning and the success of strategic business imperatives."

Kathy Watt

Manager, Business Development

College of Extended Learning, University of New Brunswick

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"Relevance is in the eye of the beholder. And for training professionals who want to earn a seat at the strategic planning table, nothing can help build corporate relevance better than applying the skills outlined in this book which will show you how to turn training into business results." **Marty Fisher, vice president, Stores HR and Training, Abercrombie and Fitch**

"This book admirably fills a serious gap in the professional practice of learning and performance -- lack of business savvy. It is clearly written, case-based, concrete and comprehensive. I especially appreciated the financial and return-on-investment content. I was also delighted that it contains material on Human Performance Technology. I will recommend this volume to my students, colleagues and corporate clients." **Harold D. Stolovitch, emeritus professor, Université de Montréal, principal, HSA Learning & Performance Solutions LLC, and author *Telling Ain't Training* and *Training Ain't Performance***

"This engaging book is absolutely essential for human resource professionals! It should be required reading for everyone in our field." **Jill Russell, principal and founding director, TPO HR**

"Some of the jewels of this book are it explains the language of finance; it provides practical advice on how to communicate the case for investing in development initiatives, and it is full of guidance on how to collaborate with the business to determine the payback of investing in development solutions. The case studies used throughout the book brings ideas to life in an exciting way. This is one of those books every HR, HRD, and training professional should have." **Judith A. Hale, author, *Outsourcing Training and Development: Factors for Success***

"If today's aspiring Learning professionals don't read this book, they will miss an opportunity to gain that ultimate competitive advantage that will revitalize their career into becoming a true business player. The primer on financial tools, business partnering and dynamic communication strategies described in this book are excellent. The book has integrated a number of innovative learning concepts, tools and methodologies that weave a comprehensive business learning roadmap for Learning professionals to attain greater business acumen and be on top of their game." **Francesca Bleck, director, human resources, Technical Learning & Development, Lafarge North America and Latin America, Corporate Technical Services**

"Changes in our industry have revealed the critical need for knowledge and skills in business acumen---the area Business Acumen for Trainers specifically and uniquely addresses. This is a must read book for anyone in a training position today or in the future." **Wes Parker, national curriculum manager, Management & Employee Development, Verizon Wireless**

Building Business Acumen for Trainers Workshop:

Skills to Empower the Learning Function

This unique and pertinent workshop is based on the soon to be released “Building Business Acumen for Trainers: Skills to Empower the Learning Function” written by Terrence Gargiulo, Ajay Pangarkar, and Teresa Kirkwood and published by Pfeiffer.

Increasingly, Learning professionals are expected to communicate in the language of business within their environment and with management. C-level decision-makers expect to see results from investment made in all parts of the business and learning and development is no exception. Learning must be accountable and communicated to management in terms they understand. This workshop is a practical and instructional approach to developing the business and communication skills of learning and training staff.

Through an interactive and practical approach we will provide training and learning managers with the steps required to developing three essential areas of business acumen:

1. Finance Skills
2. Partnership Skills
3. Communication Skills

Objectives:

Upon completion of this workshop or breakout session, participants will be able to:

- Acquire basic business financial skills
- Develop budgets and forecasts for accountability
- Integrate evaluation and ROI measures for Management
- Obtain internal buy-in and build internal support skills
- Build partnerships inside T&D and with customers
- Communicate an effective business message for learning and development

Features:

This session will:

- Work through the basic business financial terminology and required calculations
- Link the results of learning initiatives directly to business strategy (level 4)
- Understand when to deliver ROI results and how to develop business impact outcomes
- Create partnerships inside the organization transitioning T&D from a functional to an operational role
- Ensure the organization understands learning's role in the business strategy

Workshop Outline:

1. **Building Learning & Performance Business Skills**

- a. Understanding why T&D needs business skills
- b. Reviewing the vocabulary used daily in business
- c. Explaining the different types of financial statements and concepts
- d. Conducting a analysis of your financial results
- e. Communicating with peers and senior managers

2. Understanding Budgets and Forecasts

- a. Differentiating between a budget and a forecast
- b. Interpreting variances on business results
- c. Stepping up to financial forecast
- d. Developing a break-even analysis
- e. Pricing for internal profitability

3. Evaluation & ROI - What it Means to Management

- a. Defining the primary evaluation and ROI techniques
- b. Summarizing what is expected by management
- c. Illustrating results not demonstrated through ROI

4. Developing Internal Support and Buy-in

- a. Identifying key stakeholders and their concerns
- b. Working a real-life role play to an Internal Buying Team
- c. Talking to internal buyers and senior managers

5. Building Lasting Partnerships with Customers

- a. Examining the top five critical success factors of successful partnerships
- b. Exploring eight strategies for building strong partnerships

6. Developing an Effective Business Case

- a. Articulating objectives for your project
- b. Identifying drivers, needs and impact of the project
- c. Demonstrating the value of the project to business and analyzing potential risks

Workshop Details:

Methodology:	This highly experiential and interactive session combines case studies, simulations, workshops, lecture, and discussions. Participants will have an opportunity to utilize real-life examples or ones from their environment to learn how to apply the skills presented in the workshop. Instructors will provide hands-on coaching and lots of opportunities to apply newly acquired skills.
Audience:	Training/Learning Managers/Directors/Coordinators, Chief Learning Officers, HR Managers/Directors/Coordinators, Trainers , Performance Consultants, Instructional Designers, HR professionals, consultants.
Duration:	2 days
No. of participants:	Maximum 18 participants
Session Type:	Private or public sessions available
Material:	Complete course material including workbook is provided. Once released, a copy of the author's book will be included.

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Biography of Instructors and Author:

Terrence L. Gargiulo

Terrence Gargiulo has been helping people working in T&D, acquire the skills they need to be a significant contributor to the business for over 15 years. Highlights of some of his past and present clients include, GM, DTE Energy, Dreyers Ice Cream, UNUM, Bank of America, US Coast Guard, Boston University, Raytheon, City of Lowell, Arthur D. Little, KANA Communications, Merck-Medco, Coca-Cola, and Cambridge Savings Bank.

Terrence is a 5x author, international speaker, organizational development consultant and group process facilitator specializing in the use of stories. He holds a Master of Management in Human Services from the Florence Heller School, at Brandeis University, and is a recipient of Inc. Magazine's Marketing Master Award.

Terrence's books include, *Making Stories: A Practical Guide for Organizational Leaders and Human Resource Specialists* (translated into Chinese), *The Strategic Use of Stories in Organizational Communication and Learning*, *On Cloud Nine: Weathering Many Generations in the Workplace* (translated into Korean, Spanish, and Japanese), *Stories at Work: Using Stories to Improve Communications and Relationships*, *Building Business Acumen for Trainers: Skills to Empower the Learning Function*.

ROBB MURRAY

Robb has trained in businesses and organizations since 1979. His experience as an entrepreneur began in 1986 when he started his own training company in Chicago. He has continually honed his business acumen through continuing education in the areas of management and sales, and he also learns avidly through the large professional network he has assembled over the years.

Robb has trained many hundreds of audiences, and his classes are marked by clarity, enthusiasm and practicality. His early generalist identity in training became refined later through a focus on software. However, he still trains on team building, project management and creative group dynamics in business.

Robb is a ready author and a designer of courseware, both in traditional and eLearning forms. He adapts well to shifting demands on a training project and makes it a point of practicing positive expectancy. He is a low-key but attentive collaborator and has strong editorial skills. He is particularly good with learners who may be newer to a skill area who need early success experiences and a sense of mastery to feel the motivation to put forth sustained effort. Robb is very good at bringing out people's best, and student feedback nearly always reflects an appreciation of this.

Robb is a believer in skills verification and in keeping the value of training to a business very clear and demonstrable. He feels that "business acumen" is under-perceived in the training world as the valuable asset that it is and he is very interested in helping to bridge that gap through training such as this Verizon project.

LIN O'NEILL

Lin is a business and organizational visionary who gets results. She is uniquely skilled in helping individuals, teams and organizations—in both the profit and nonprofit sectors--articulate goals and drive to closure while maximizing employee morale.

Lin excels at leading others in doing more with less. As a successful corporate executive and entrepreneur, she draws upon vast experience with business analysis, turnarounds, coaching, culture change, regulatory compliance, business process definition and implementation, downsizing, government interface, franchises and multi-level/cross-functional teams for cost reduction and productivity increase.

Lin also brings a warmth and sensitivity to her work, teaching clients to empower themselves and others while driving results, encouraging creativity, resolving conflicts and reaching closure.

With a background in business, human resources and psychology, Lin has been a corporate officer and president of her own firm. Her talents stem from practical experience such as that gained while Vice President of Inflight Service and Corporate Officer for Continental Airlines where she managed several thousand employees in remote locations as well as inflight service quality. Among her numerous accomplishments: insuring work continuation during a strike which threatened the viability of a major transportation company and design/ implementation of a team-based training program resulting in a 43% decrease in the operating costs of a division of a national agricultural firm.

Lin has a B.S. in sociology, an M.B.A, is licensed as an RCFE Administrator and certified as an RCFE/ SNF Activity Director. She is listed in Who's Who Among American Women and has taught in colleges in California and Oklahoma. For more than two years, Lin conducted a weekly talk show on K-F-O-X, a Los Angeles F M radio station. She is a member of Greater Dallas Chamber of Commerce, Human Capital Institute, Alliance for Women and Technology, NAWBO, Dallas Friday Group, and B.P.O.E., a past Board Member for the Alliance on Aging, and a partner in Sakred Cow Enterprises. Currently, she is completing her MCSE credential.