

Getting The Most Out of an "Outside" Trainer by Barry Thompson

When a financial institution retains a professional trainer or consultant, it's important that adequate information is provided in advance for the trainer on exactly what the goal of the training is - what the financial institution is trying to accomplish. For training to be as successful as possible, be prepared to share some information and ask and answer some questions. For instance:

1. What past training has your staff received?
Discuss in detail past training programs-both successes and failures; what works with your people ... and what doesn't.
2. If you have relied on video training, what videos did you use?
This allows the trainer to evaluate exactly what your staff knows so he/she can add new content or reinforce past training.
3. What exactly do you want to accomplish?
Everyone has a specific reason for hiring a trainer; communicate this reason to the person you have retained.
4. What policies and/or procedures are affected by the training that have to be incorporated in the training session?
If your recommended practice is to lock the door before hitting the alarm in case of a robbery, you don't want your consultant/trainer advising hitting the alarm as soon as possible whether or not the door is locked. If you put holds on all foreign deposits, you don't want the instructor assuming next day availability on all deposits. Go over details carefully.
5. What changes in behavior or actions do you expect from the staff after the training?
This question allows trainers to quantify exactly how we will determine if the training was a success.
6. How are you going to reinforce this training after the trainer leaves?
Unless the training concerns a mandatory change in regulations effective on a certain date, it's difficult for a one-time training session to change the behaviors or actions of your staff. Any time you hold training sessions, develop a follow-up program to reinforce your message.

I was retained by a financial institution recently to conduct basic robbery training four weeks after their call. After having a long conversation with the security officer, during which we discussed many of the questions above, I was able to put together a program that was well received and deemed extremely successful by the financial institution. I was able to reinforce the security officer's policies and procedures and we were able to involve the participants in a lively discussion about recent robberies.

One last suggestion - unless you have had a long, successful working relationship with your trainer or consultant, plan on attending the training session with your employees. It's the only way you can be sure of the quality of the training.

Barry Thompson is Managing Partner of Thompson Consulting Group and a 27 year veteran of the banking industry. He does bank training/consulting out of Oswego, New York. He also organizes security conferences for trade groups; is an advisor and contributor to Bankers' Hotline; and is a security and compliance "guru"

for www.bankersonline.com. Barry can be reached at 315-342-5931 or at tgroup@twcny.rr.com

Copyright © 2004 Bankers' Hotline. Originally appeared in Bankers' Hotline, Vol. 14, No. 6, 10/10

Original Article Located at <http://www.bankersonline.com/articles/bhv14n06/bhv14n06a3.html>

Copyright, 2000-2014, Bankers Online. All rights reserved.

This information was printed from the BankersOnline.com web site located at <http://www.bankersonline.com>