

Records management brings change

All the methods that can save space and increase efficiency in storage and management of records will result in changes that will require training of employees



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Facility managers with records management responsibilities are implementing major changes in today's business world. All of the topics we have discussed here in previous columns, such as classification schemes, retention schedules, offsite records storage, or document imaging, involve changing, in some way, how your organization does business. That kind of change also means changing what your organization expects of its employees.

What is often overlooked in managing change is that employees do not automatically know, or understand, what is expected of them. Expectations must be communicated. When expectations change, those changes must be communicated in advance. This need for communication is what drives training programs in most organizations.

A training or performance issue?

However, records management training programs are rarely as effective as they could be. Many records managers view training as a means to improve performance. Where performance is suffering due to a lack of knowledge or skill, training may improve performance by imparting knowledge or developing job specific skills. However, performance problems are not always training issues. As a rule of thumb, training is appropriate where:

- Someone does not know something; and
- They need to know it to do their job.

If employees already know how to do the task in question, more training is not the answer. For example, if users are not describing the contents of a records centre box clearly and accurately, training may or may not solve the problem. If they already know how to describe box contents, but choose not to do so because it is a tedious task, this is a performance, rather than a training issue.

On the other hand, a new system that changes the way staff will do their work can only succeed if training is included in the process. For example, the implementation of a new document imaging system will fundamentally change how records are dealt with. This applies not only to the records management team but also to end users, managers, systems staff, and perhaps even your customers.

Prepare, prepare, prepare

How can we ensure that training will be effective? The most important consideration is preparation. Abe Lincoln once said, "If I had eight hours to chop a tree, I would spend six of them sharpening my axe." You can sharpen your training by ensuring that the content is targeted to the audience. You may need to research the training topic for ideas on how to present it effectively. You also need to prepare your training room, arrange for audio visual material, handouts, and refreshments. This all takes time, and, too often, managers organize internal training sessions without allowing for these preparatory activities to take place.

The goal of training is to impart knowledge or skill in the participants.

Executive viewpoint

Expectations of staff will change when measures are implemented to gain the enhanced efficiency possible with effective records management. Communication of what those expectations are, and how they can be met, is a vital part of employee training.

Training should not be a demonstration that the trainer knows how to do the task involved. Rather, the goal is for the participants to be able to do the work expected of them when they complete the training. Training should not be based entirely on "telling", or "lecturing". All training involves communicating. However, it should also involve experience and practice. An effective training session includes "skill checks" - exercises that ensure that the skill needed to do the task involved has been imparted to the trainees.

It is also important to think about when training sessions should take place. Training is not something that a trainee can store for later use. If we are trained on a task, we need to start performing that task as soon after the training session as possible. Some training programs take place long before the tasks involved need to be done. When the time comes to do the work, a large part of the training has been forgotten, and the skills required have not been developed.

As you plan to implement changes in the way your organization manages its records, be sure to plan for training to support those changes. The implementation will have fewer headaches, and employees will have the skills they need to maintain the new systems in the longer term.

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