TRAINING AND DEVELOPMENT MANUAL

Final Report

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SUPPORTING THE A & E BUSINESS COUNCIL IN DEVELOPING HR FRAME WORK

FINAL REPORT

USAID JORDAN ECONOMIC DEVELOPMENT PROGRAM

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TRAINING AND DEVELOPMENT

Staff training and personal skill development is a key factor for architecture and engineering firms in attaining their key business objectives. Without continued learning and professional development, a firm can become stagnant and stale. Employees can feel stunted in their career growth and seek opportunities elsewhere. Most firm leaders understand this and recognize the value of a dynamic, effective training program for their managers, technical professionals, and administrative staff.

It costs money to train people. These costs include registration fees, travel expenses, and—often most expensive of all— lost billable hours.

When it comes to training, however, the wisest and most successful leaders in the industry look at it from the opposite perspective. Rather than consider the cost of training their staff, they consider the cost of not training their staff—which far outweighs the argument against training.

It is essential, therefore, to develop an efficient, workable process for ensuring that the company provides sufficient training to its employees.

Architecture and engineering firms sell design services for a living—that are produced by their human capital. Manufacturing plants upgrade and maintain machinery on a regular basis and invest large sums of money to make those systems sharp and well run. So too the human capital in design firm requires updating and investments—essentially training and professional development to ensure the team has the most sound and honed skills possible.

The best firms do not take training for granted and have the fullest emotional and financial support by senior management as a means to achieve the firm's strategic objectives.

The following sub areas were identified as those that need improvement and are addressed in this manual:

- Designing and implementing a formal orientation program for newly hired employees
- Designing and implementing a formal process for career planning
- Using different techniques to assess training needs
- Setting training plans based on training needs analysis
- Giving the chance to all employees to participate in training workshops
- Improving firms' investment in training and development
- Establishing formal mentoring and coaching programs

CHAPTER ONE

NEW EMPLOYEE ORIENTATION

1.   ORIENTATION OBJECTIVES

All details matter to a new employee and having all preparations in place for the first day will set the tone for a good impression or one of negligence. If things are not ready on the employee's first day, his or her self-doubt about accepting the position will only be heightened.

Once an employee has accepted the offer of employment, the HR department should have three objectives:

- Make the employee feel like he or she made the right decision in joining the firm

- Integrate the new employee into the corporate culture

- Make the employee into a productive team player as quickly as possible

2.   ORIENTATION PROGRAM

2.1   Before the First Day

Because a new employee seldom starts at the firm immediately following the acceptance of an offer, it is important to keep in touch with a candidate during the lag time. Points to consider include:

- Get the new employee on the email list for any future projects they will be working on. This keeps them appraised of the status and makes the new hire already feel like part of the team.

- Give newly relocated staff extra attention. Employees that relocate have more to manage than those within the immediate area do. It can be overwhelming. Before out-of-towners start on the job, identify current employees who had similar personal situations and encourage them to reach out to the new employee as a resource.

- Have as many materials and formalities taken care of before hand. The first day and first week will be busy ones for the new employee. Use this time to accomplish as much as possible (preparing office space, cubicle, computer, IT privileges, business cards, paperwork, etc) so the employee feels they are ready to start when they arrive.

2.2   First Day Orientation

Effective new employee orientation involves a great deal more than handing over a policies and procedures manual and a summary of benefits. The orientation process should go on for some time and its main goal should be to make a new employee feel like he or she belongs in your company right from the start. Elements of an effective program include:

2.1   A Central Resource

- Regardless of firm size, one specific person should be designated the central resource for a new employee's questions or concerns. This is likely a member of the human resources staff. This person must be highly knowledgeable about company policies, benefits, and other administrative procedures. They must also be friendly, strong communicators, and act as an internal salesperson for the firm. This helps the

new employee feel comfortable in their choice to join the firm. In fact, as a strategic and supportive aspect of the firm, all personnel in HR should have good people skills and all staff should feel comfortable approaching the HR team with questions or concerns.

- This person should make a formal email announcement to the firm that this new employee will be starting and ask that everyone welcome him or her when they meet them. This also alerts key people to be visible on the day the new employee arrives so that positive introductions can be made.

2.2   Involvement of Direct Supervisor

- Make sure the employee's direct supervisor is available on the day the new hire begins. In fact, the supervisor should try not to be out of the office for more than one day during the first two weeks. Not being available regularly to guide the employee during this time can often leave the new hire feeling stranded.

- Pre-arranged with the central resource, the supervisor should plan to spend two or more hours with the new hire to give a debriefing on projects or areas of responsibility the new hire will assume. This will make the employee feel engaged, welcomed, and excited to start. Keeping it short on the first day, however, will not overwhelm the new employee.

- The direct supervisor should briefly discuss the activities for the next day and set an appointment to meet the employee to discuss the particulars of the job and position.

2.3   Office Tour and Introductions

- Give the new employee a thorough tour of the office premises and introduce him or her to key people. It is essential to notify these people in advance and require their participation in welcoming this new hire. Although the introduction should be brief, it presents a strong introduction and positive start for the employee.

- The new employee should be given information on everything they need to know about the office or cubicle space, security codes if required, kitchen area, restroom locations, parking, or any other facilities or special departments they will need.

- Either the point person or the supervisor should take the new employee out to lunch.

2.4   The Policy Manual

- The central resource will ensure the new employee understands the firm's policies and why they are in place. At this point, new employees will also receive an explanation of the firm's benefits program and complete any required paperwork.

2.5   Welcome Package

- In addition to the firm's policies, provide a package of materials that will help the new person get comfortable and up to speed as quickly as possible. You want the new hire to become familiar with the culture in your office within the first few days.

- What to include in a New Employee Welcome Package:

- The latest firm newsletter

- A description of the firm's history

- Summaries of recent and current key projects with the names of the associated project managers

- Professional biographies of the principals

- Recent firm announcements and a schedule of upcoming firm events

- Contact information for other departments and offices

- Any key documentation for projects the new hire will work on: scope and fee proposals, project team contact list, project status report

- Shirt, pen, briefcase, pad of paper, etc with firm logo

2.6   Assign a Professional Peer

- Different from a formal mentor, this person is someone with whom a new employee can quickly establish common ground. It can be someone that works on similar projects, has similar interests, or has a similar background. The official role of this peer is to show the new person the rhythm of the firm for the first few weeks. This includes introducing the new hire to other staff, going to lunch, and bringing him or her along to any social gatherings.

- Handpick employees who are excited about serving in this role and are excellent role models within the firm. Interpersonal skills are required, as is a sincere interest in helping out. Providing honest and accurate information and insight are also essential since this person is the ambassador of the firm. These peers are often veterans of the firm and truly believe this firm is the best place to work. It makes no sense to orient the new employee with someone whose own performance is suffering and has a negative opinion of his or her supervisor or the firm. Enlist someone who easily demonstrates the values your organization espouses.

3. ALTERNATIVE PRACTICES

3.1 Customizing the Orientation Process

Some firms have very regimented orientation programs and others have less formal ones in place. The goal is to have one that fits the size, culture, and resources of the firm. Dedicating the financial and human capital resources to this effort indicates how serious the firm is on retaining staff and getting the employee off on the right foot.

Not all firms can spend the same amount of time or money on this initiative. Therefore, some additional best practices are offered here as a way to broaden and customize the orientation program in your firm.

3.1 Formal Presentations for Groups

- In larger firms where several new hires start within days or weeks of each other, the HR department or central resource will organize formal orientation presentations for several new starts at one time. These are scheduled as clusters of employees are brought on, and may occur a week or two into a new employee's tenure.

- On this scale, the orientation program is run by the firm's "university team" which is composed of HR and training professionals, and others within the firm that are constantly working on the material. They also assist senior leadership with their presentations.

- The formal presentation can last from a half day to a whole day program—depending on the content chosen for the orientation. Typically, a structure of this type will cover the firm's culture, service offerings, policies, procedures, manuals, market sectors, and organizational structure. Executives from various groups at the firm talk about what makes the firm unique from its competitors and will also include firm history, software training, quality management, benefits, and human resources information.

- This format requires much more involvement from higher-level individuals, designed, and scheduled in advance. However, it is also a very effective program and is a unique way to highlight the firm from the start.

3.2 Customized Attention in Smaller Firms

- After the first day with the central resource in HR, orientation becomes more individualized based on factors such as position and industry experience. This path closely follows the process outlined above and is coordinated and executed by the HR director or central resource.

- The HR director covers most of the formalities; while the direct supervisor or others deliver the day-to-day operations, tools, and basic training needs on the team.

- Again, because small firms may lack the personnel to fully collaborate in or build a full orientation program, the new hire is paired with a project manager to learn the ropes of the work the firm does and the clients the firm serves.

CHAPTER 2

CAREER PLANNING

Career planning is the long-term vision for an employee's tenure and professional development at the firm. It assumes a large investment over time but has requisite benefits that make the planning and investment worthwhile.

Referred to as CDP, the Career Development Plan or Program becomes an essential facet of an employee, their relationship with the firm, and the success that results for both.

1. CAREER DEVELOPMENT OBJECTIVES

The ultimate goal of the CDP is to support the firm's vision—whatever that may be. More pointed objectives for establishing a CDP include:

- An investment in people and processes, providing staff the tools needed to undertake challenging tasks, empowerment to change and improve the firm, maintaining quality operations, coaching, support of long-term business decisions, and building and maintaining relationships with clients.

- A means by which to address the extraordinary levels of change in the industry and in the world.

- A validation of the firm's philosophy to hire the most creative and talented people possible, synchronize their professional goals with challenging and inspiring work, and invest in their future as design professionals.

1.1 What the CDP is:

- A document used to indicate training and development needs and to identify possible training solutions.

- An action-plan, which focuses on immediate and short-term goals, that is in line with the longer-term goals of the employee and the firm.

- A joint effort between the employee and the manager providing feedback and discussions regarding the employee's goals, development needs, and plans.

1.2 What the CDP is not:

- A performance appraisal. The CDP does not replace a formal performance appraisal. While strengths and weaknesses are considered, the employee is not being rated.

- A contract between the employee and the manager. It is just a plan and while everyone wants to execute that plan, it is essential to understand there may be situations during the year where the plan has to be adjusted due to financial pressures of the business.

- A promise for promotion upon completing training objectives. The CDP does not guarantee advancement, but does increase the employee's ability to compete for future jobs as they develop skills and knowledge.

2. CAREER DEVELOPMENT PLANNING (CDP)

Designing, facilitating, executing, and participating in a CDP program requires the full participation of three parties: the HR point person, the employee, and the employee's supervisor. Each has a different role and responsibility in the process but all three have to work together to make the effort a success.

2.1 Developing the Program

Not all firms can spend the same amount of time or money on this initiative. The steps and best practices provided are intended as a guideline and are of course scalable to the resources and commitment available.

It should be understood that developing a program of this magnitude takes time and is not designed overnight. Given the other priorities of the firm and the collaboration required among many busy colleagues, the development of these programs can sometime take months.

Even large firms that hire a full-time specialist to specifically lead this project can wait a year before a program is implemented and operational. Most small to medium sized firms will appoint an HR or other manager to champion this effort while still balancing other organizational responsibilities.

It is worth not rushing through the development process simply to get a program up and running. There will be more adjustments and changes made during implementation that could and should have been avoided by a little more time in the planning phase. It is, however, also not effective to labor over details in search of perfection. Some tweaking will always take place and continuous improvement will drive necessary changes.

The steps in developing a program right for the firm include:

2.1 Forming a Committee

Designing this program is a daunting task for one person and even so, a complete and well-designed program seeks input from the managers that will be working with it.

- Depending on the size of the firm, form a committee that makes sense. Too many people stalls decision-making and too few limits the perspective that can be gained.

- Participation on the committee should be voluntary and the leader should look to all levels of the firm to participate—not just limiting it to the senior level. Employees on a seemingly fast track already in the firm may offer valuable insight to the process.

- One person, typically the HR point person or another chosen by senior management, will lead the effort. Although the committee serves as a peer group to help influence decisions, the lead or project manager has the final decision.

- The committee should meet as often as makes sense for the program and yet respects the schedules of the participants. One of the common mistakes is meeting too frequently at the beginning when there is excitement for the new initiative.

- During the process, the HR point person or manager will delegate tasks to members of the committee to assist in the effort. Like any other initiative, members are expected to complete tasks and sub-projects on time.

- Once the program has been approved and launched, the committee disbands.

2.2   Establishing Objectives

- In order to make the economic and strategic justification for the program, the committee has to establish the objectives the program seeks to achieve. This sets the vision for the program and stands as the litmus test to judge whether those objectives have been accomplished.

- Since these objectives will be communicated to and shared with the entire firm at the launch of the program, special consideration should be given to how they are worded and expressed. In addition, the objectives should be clearly tied to the vision of the firm and make sense to everyone.

- Generally, firms establish three to five clear, exciting objectives.

2.3   Establishing Professional Tracks

In smaller architecture and engineering firms, employees will follow one of two tracks—a technical track or a project management track. Courses and training appropriate for these tracks are then further developed and provided within the firm's Training Program.

- **Technical Track:**   This approach is targeted towards staff that operates in a technical support role, rather than a project and personnel management position and primarily focuses on individual technical and professional development.

- **Project Management Track:**   The program for project managers focuses on business development and management skills in addition to technical progression.

It is not common but employees may start down one track only to switch to the other. A thorough conversation and in-depth assessment of the employee should temper this from happening too often. It occurs more often that a more conservative technical employee underestimates his interest or capabilities to be a great project manager and so switches to the project management track later on.

2.4   Career Mapping

Employees cannot develop professionally if they do not have an intermediate or end position on which they can set a goal. Careers are mapped out towards existing positions in the firm. Some specialists may map out careers towards a future position the firm has never had before but is a strategic goal. To map careers, CDP requires the following:

- **Organizational Flexibility:** If the organization is flat or has zero growth, there will be little opportunity for an employee to grow professionally. The employee will, of course, be gaining skills and education, but the CDP assumes the employee's upward movement in the organization. Gaining skill but not advancing in position is will not be motivating or rewarding to the employee.

- **Position Descriptions:** This program assumes the firm has clearly defined the skills, duties, and professional expectations for each position in the firm. These descriptions become the professional development targets to which employees map their progress—achieved by training, mentoring, self-study, and practical experience they gain either through formal or informal means. A CDP cannot exist without these.

If a technical employee wants to become a project manager, he must know what it means to be a project manager at the firm (description), assess his current skill set, and progress towards the project manager position through practice and training

(development). If there is no room within the organization to add a project manager, this employee will have little reason other than personal curiosity to take on the training. The danger is then the employee will take the training and work for another firm where opportunities lie. This is why organizational flexibility is important.

Mapping out career progression based on positions in the firm can be a complex task. If there are no existing descriptions or no one in the firm has really given progression much thought, the task will become even more difficult. This is where some firms abandon the entire effort.

Some best practices that apply include:

- Keep the progression as simple as it can be with notable differences in that progression. It does not make sense in a mid-sized firm to have Engineer 1, Engineer 2, Engineer 3, Engineer 4, and Engineer 5 where there is little distinction between each level. It is better to have three levels with larger jumps in responsibilities and expectations at each level.

- Going through this exercise may force hard decisions but essential ones. Firms that engage in this typically overhaul legacy descriptions and titles but cleaning this up will only make the CDP more efficient and easier to use for participants.

- HR may encounter pushback from various areas in the firm—maybe even from senior management. Senior management has the ultimate say but an open-minded leadership team that has committed to this effort should understand this has to be done. HR's argument for it becomes stronger when it can defend the reasoning with best practices.

- Position descriptions are not necessarily the same as titles on an organizational chart and a firm should never have as many descriptions as it does people in the firm.

- Many HRIS programs are available that can manage an employee's progress and course work. However, firms that do not have a system devise spreadsheets for the firm or groups of employees that depict their courses completed and progress.

2.5   Establishing Core Competencies

Establishing the core competencies the program will hone in on is the most important phase in building the CDP. These are generally deemed mission critical to the organization's overall, long-term success and employees are measured on them during the CDP review.

These will vary slightly by firm, however, architecture and engineering firms often gravitate towards the following since they touch every aspect of the business:

- **Customer focus.** Works with internal and external customers; assesses customers' needs and expectations; provides information and assistance; resolves their problems; committed to providing quality; gains the customer's trust and respect.

- **Integrity and trust.** Widely trusted; presents the truth in an appropriate and helpful manner; maintains confidential information; admits mistakes; displays high standards of ethical conduct; supports the firm's guiding values in good times and bad.

- **Teamwork.** Encourages and facilitates cooperation, pride, trust, group identity; develops a shared understanding among teams and builds on a common purpose;

fosters commitment and team spirit; works with others to achieve goals; facilitates an open exchange of ideas and an atmosphere of open communication.

- **Communications.** This competency focuses on the ability to communicate clearly, effectively, persuasively, and succinctly, both orally and in writing; uses active listening; projects credibility and professionalism.

- **Technical skills.** Possesses the technical knowledge and skills to do the job at a high level of accomplishment and within the standards of the profession; participates in professional organizations to increase knowledge; stays current with the latest developments in the field; open and willing to learn new technical skills and knowledge.

- **Ability to deliver results.** Sets and pursues aggressive targets; can be counted on to consistently meet or exceed goals; consistently a top performer; bottom-line oriented; will stand up and be accountable; achieves results without stepping on others; committee to organizational success; seeks to improve the work environment and the product and service quality.

2.6   Training Courses

The topic of courses, programs, and seminars will be covered more in-depth in the next chapter. It is worth mentioning here however that courses should be tagged, referenced, or color-coded to a particular track and a competency. Similar to a college curriculum, the employee is aware of what is necessary in their development.

2.7   Self-Assessment

An employee may have to have some assistance in choosing a track to follow in the firm. Others will know which path they want. It is up to the committee to determine if a self-assessment form will be useful to the employee in making this determination. It should however be kept simple and assess the employee's:

- Confidence with his technical skills

- Ability to improve the work and project environment and the quality of the firm's products and services

- Competence in oral and written communication

- Reputation for technical skill and knowledge

- Ability to gain the client's respect and trust

- Participation in professional organizations

- Openness to feedback and improvement

- Reliability to meet or exceed goals

- Organization of people, projects, and tasks

- Approach to finding technical solutions

This is not an exhaustive list but it starts the employee thinking in terms of their comfort with clients, technical abilities, and bigger picture thinking. Both the manager and employee should realize that if an employee is not comfortable with managing people that does not prevent him from following the project management track. Training fills that gap in skills.

Likewise, someone that is a good communicator does not have to become a project manager. Their passion for innovation in design and solutions may better serve the firm by following the technical track. Their communication skills can be put to use by teaching in-house training courses.

2.8   Assessing Manager Fit and Readiness

Not all managers will be suitable for participation in this program. Because of their role in the firm, some will also be inaccessible. Because of the attitude towards development, others will not support such a formalized program. It is common that a small number of managers should not participate and HR should never force participation. HR should assess the readiness of managers to participate and with senior management's approval, elect to have these few opt out.

- An inordinate number of managers that are unsupportive of the program or deemed to be inappropriate candidates to participate signifies a larger issue at the organization. Participating in a CDP does add responsibilities and requires special leadership skills but these are expectations of leaders.

- Not all managers will have the immediate skills or comfort level to carry out the program or they will think they do not possess them. Most often, these issues are resolved with training and role-playing with HR.

- Assessing manager fit can be as simple as a conversation that answers the following:

    - Does the manager understand the program, requirements of participation, and the demands on time it will present?

    - Is the manager enthusiastic about the program and believe in what it will achieve for the firm?

    - Does the manager have any personal or professional hesitations regarding the program that may hamper its successful implementation?

    - Since HR will provide training on special skills for managers, are there any areas the manager would like to improve such as interviewing techniques, giving critical feedback, or goal setting with the employee?

2.9   Launching the Program

Given the investment and work to date on the program, reaching this moment is an achievement in itself. All participants involved in the effort or committee members who participated should acknowledge this work well done. A thoughtful marketing campaign should surround HR's launch of the program.

- All the documents and collateral that make up the program should be graphically designed and formatted so they generate excitement. It is worth the extra time and money to produce booklets rather than printing the program in a plain Word document. HR can work with the marketing department or an outside designer to create such booklets.

- As the launch date gets closer, celebrate it by building anticipation in emails or other HR announcements. This is something everyone should be anxiously awaiting.

- Depending on the size of the firm and location of the employees, the launch can take place as a special group meeting or a Webinar. If there are branch offices, the HR point person should make a special trip to celebrate the launch there as well.

- The introduction of new programs and requirements may appear burdensome to employees initially. Extra communication highlighting the commitment the firm is making, the objectives it wants to reach, and the value it places on employees is warranted.

- The HR point person should walk through the fundamentals of the program, articulate the opportunities for everyone, and elaborate where they can find additional information. At this meeting, everyone receives a copy of the booklet.

2.2   Manager Preparation

Once the program has been established but before it has been launched across the firm, it is essential that all managers be trained on its features, functions, and objectives. All managers are role models to their employees and they look to managers for direction, approval, and models of behavior.

For this reason, it is essential managers appreciate the importance of this program and that their attitude and involvement will help make or break the success of it for the employee and the firm.

2.1   Manager Training Points

HR should convey the following to all managers:

- HR is the shepherd of the program but the manager will execute it and have the most direct involvement with the employee on a regular basis.

- HR is available at all times to address questions and help the manager in any stage of its deployment.

- All documents and supporting materials that comprise the program are available on a shared drive, intranet, or SharePoint.

2.2   Manager Requirements

This program represents a large-scale commitment in both time and monetary resources and therefore becomes a critical business function. At minimum, the following should be expected from managers at the firm:

- As mentioned, in some firms, it is clear that a few managers would not add value to the process and would instead be detrimental to the employee's development. These have been filtered out of the process by this point.

- Those that remain, however, and pledge to be committed must remain committed. Failure to participate in the program and conduct all required elements represents a lack of commitment and should result in disciplinary action.

- As a leader in the firm, developing the next generation of leaders in a fostering, enthusiastic manner is a requirement of the position. Exclusions include those that HR and senior management believe should not participate.

- Routine follow up with HR to ensure the program is implemented and executed fairly, appropriately, and that any changes or deviations from the program are acceptable.

- A true and fair assessment requires intimate knowledge of the employee, absence of bias, and openness to all ideas and opinions the employee may have regarding their skills and their career path.

2.3   Employee Involvement

Once a career development program has been designed, approved, funded, and launched, it is time for the principle participant to enter—the employee. While HR may disseminate a majority of the information regarding the program, the steps and exchanges in this process will take place primarily between the employee and his immediate supervisor.

2.1   Information and Documentation

Assuming HR has assembled a document that outlines the program and conducted a firm-wide launch of the CDP, the employee should have another brief discussion with his supervisor that:

- Briefly recaps the CDP, its objectives and the critical role it will play in the professional life of the employee at the firm.

- Answers any specific questions the employee may have following HR's presentation and launch.

- Clarifies what the program is and is not intended to provide or guarantee.

- Validates the collaborative and supportive approach the supervisor and employee will together take on this process.

- Establishes a relationship of trust that the manager has the best intentions of the employee in mind at all times.

Given the investment behind this program, the commitment it makes to the employee, and the success that is anticipated, it is very important the supervisor be excited about helping the employee in this endeavor. As mentioned above, an uninspired manager can quickly sour all enthusiasm in this program.

2.2   Immersion in the Program

With the information and documentation needed to get started, responsibility transfers to the employee where they then take control of the process. As with any program, keeping it simple and manageable will lend to its success—particularly as it competes with project and regular job demands. Five steps are generally all that are required:

- The employee conducts an individual self-assessment designed by HR and the committee. This prompts the employee to think about career goals and individual competencies. The employee should be considering the track he will follow.

- The employee schedules a CDP meeting with his manager to discuss the assessment, which has been given to the manager in advance of this meeting.

- During the CDP meeting, the employee and manager discuss and reach an agreement on the goals identified and potential development needs. Additional

agreement is made on specific seminars, courses, and other options that may meet those development needs.

- The employee and manager formalize the CDP by making any changes and summarizing the agreed upon goals and plans. Both will keep a copy of this agreement to monitor progress. A copy is also filed with HR.

- At this point, the employee has approval to enroll in the training courses discussed typically scheduled to happen throughout the year or into the next eighteen months depending on availability and funding.

2.3   Review Process for Technical Track

Employees following the technical track will discuss their progress twice a year while those on the project management track will meet just once a year. Technical skills have shorter time durations to develop so an added review meeting is warranted.

The following are common questions to discuss during the review that should last from 30 to 45 minutes. Informal reviews should happen quarterly and take only 15 minutes.

- Identify the single most important technical and professional lessons you have gathered in the last 6 months.

- What do you feel is the next step for your career here?

- What are your long-term goals (5 years) in terms of career and professional development?

- Are there any current or upcoming projects with which you would specifically like to be involved?

- What areas of work are you most comfortable with and what aspects of your work do you find the most challenging?

- What seminars, conferences, and training courses have you attended since your last review? Which would you rate the most highly, and which would you not recommend?

- In what areas would you like to receive formal training in the coming year?

- Are there any tasks that you undertake that could be assigned to more junior members of staff? If there were, how would you approach the handover of this workload?

- What things do you feel the firm could do better?

- Are there any business opportunities you can see the firm is failing to capitalize on?

- Was your previous review of benefit to you?

- What action items are still outstanding from your previous CPD review and why have these not been addressed?

2.4　Review Process for Project Management Track

The following are common questions to discuss during the review that should last approximately an hour on an annual basis. Informal reviews should happen quarterly and take only 20 minutes.

- Summarize the highlights of your last year at here at the firm (technical, management, or business development).

- What were the main challenges you have faced in the last year (technical, management, or business development).

- What do you feel is the next step for your career here?

- What are your long-term goals (5 years) in terms of career and professional development?

- What seminars, conferences, and training courses have you attended since your last review? Which would you rate the most highly, and which would you not recommend?

- What formal training do you plan to attend in the coming year?

- Summarize the performance of your team(s) over the last year from both an individual and a group perspective.

- Are there any areas where we need to augment the capabilities of your team(s)? If yes, how will we best achieve this?

- How do you foresee your team(s) developing over the coming year?

- Are there any opportunities to increase the leverage of your team(s) without impacting project delivery and quality? If so, how do you plan to manage this?

- What hiring opportunities do you foresee for your team(s) over the coming year and what level of candidate experience will these require?

- Are there any business opportunities the firm is currently able to address but is failing to capitalize on?

- Are there any business opportunities that you would recommend the firm targets in the future? If yes, what changes would need to be made to our present staffing numbers, organizational structure and operating philosophy to realize these?

- Are there any areas where our business development structure needs to be strengthened (marketing, sales, follow-up, project delivery) and how should this be accomplished?

- How can the firm improve the quality and efficiency of staff development and project delivery?

- Are there any structural or operational challenges that you believe the firm will need to address in the coming year?

- Was your previous review of benefit to you?

- What action items are still outstanding from your previous CPD review and why have these not been addressed?

2.5   Ongoing Commitment

The assumption with a career development program is that it involves a commitment over time by the employee and the firm. Although the plan is updated on a yearly basis, it continues for all the years of an employee's tenure.

- Managers should be keenly aware of the level of commitment the employee is putting into the program and be alert for any red flags. These include lack of interest, easily meeting goals, or missing goals and making excuses.

- If commitment is waning, the manager should discuss this with the employee immediately. There may be personal or other conflicting issues the employee is dealing with that are stealing attention and effort from the program. The manager can discuss this further with HR.

- Likewise, the employee deserves the fullest commitment by his supervisor. Most of this program should be employee driven but if the employee feels the support is not adequate, he should have this discussion with the manager or with HR.

2.4   Managing the Program

As mentioned, there are three active participants in this process who contribute to the success or failure of the program—the HR point person, the manager, and the employee.

2.1   Best Practices

The best practices to keep in mind after the program has launched include the following:

- All new programs will require tweaks or minor improvements after going live. A program of this size and nature will never be foolproof and the initial implementation of it may feel clumsy to many people.

- It is especially important to remind participants to be patient but positive about the program and that minor tweaks do not indicate a failure of the system.

- The HR point person has ultimate management of the program as it is administered and is responsible for ensuring all supervisors participate. Any manager not participating should be removed from the program so the employee is not affected. Most disciplinary action taken is in the form of a reduced bonus.

- The manager is responsible for keeping the employee on track with their program and guiding the employee in the direction he wants to go. A manager uses his skills, experience, and intuition to make these recommendations.

- The employee is responsible for his individual progress in this program and held accountable to ask questions, retrieve information, and collaborate with his manager and HR.

2.2   Specific Maintenance and Improvement

Continuous improvement on the program is expected and achieved by the following:

- If appropriate considerations are taken in the upfront design, fewer adjustments will have to be made later. However, this plan should also make routine assessments and reviews to discover if it is functioning as intended. Employees and managers alike are entitled to provide input on this. HR typically uses surveys to gather this information or focus groups.

- Keeping an open mind in listening to the suggestions from the participants is essential and understanding this is a program that benefits everyone should drive collaboration to make it the best that serves the firm.

- Tying training course reviews back to the CDP is important. Training course reviews are discussed in the next chapter. HR would inform all managers of training courses deemed ineffective and removed from the program. Managers would use this information in their conversations with employees.

CHAPTER 3

TRAINING PROGRAMS

Like most things in business, a good training program starts with a good plan. But when you start talking about training it's easy to fall into the trap of "doing what sounds good."

Training for training's sake is not the foundation of a viable strategy. A critical first step in creating a workable strategy is to remember why you are training in the first place.

1. TRAINING OBJECTIVES

The only reason to do any kind of training is that it is in the firm's best interests. That means there should be some measurable change in skills or aptitudes that result in the firm being more successful. The reason for competing in the architecture and engineering industries is to provide service to customers; it is not to provide training to employees.

With that said, firms that have the best, most useful training programs identify training objectives that improve not only the capabilities of the employees, but have positive affects on clients, and impact the bottom line.

1.1 Objectives

Primarily the training program supports the career development plan by selecting, organizing, and providing the educational, business, and technical sessions employees need to fulfill goals and improve capabilities.

It is possible for the program to have other, more targeted objectives—such as increasing participation across the firm. These are just as important and should be identified.

2. TRAINING PROGRAMS

2.1 Developing the Program

Nearly every firm says that career development and training are priorities. There is a vast difference between saying it and truly committing to it. Before the firm can develop training plans that compliment a CDP, it has to have the following:

- Management Buy-In. No training program will be effective or successful if top management thinks it is a waste of time or micro-manages the process. This is not to say that all training is good training. HR or another manager must constantly monitor and measure the program's impact on the firm and be prepared to justify its existence.

- A Budget. This is why it is essential to have the HR manager present at the strategic planning sessions or budget meetings. CDP and training programs are expensive—especially when firms want all employees to benefit from it. Budgets vary from firm to firm and range anywhere from a low of 0.3% of Net Service Revenue to up to 3.5%.

- A Firm Priority. Training and development affect everyone in the firm. Whether it concerns those planning the program, managing it, executing it, or participating in it, if it is not done with a sense of passion and priority, it will not be successful.

Once the firm feels it has these in place, it can begin the process of developing training plans that compliment the CDP.

2.1   Forming a Committee

Often the training plan is designed in tandem with the CDP. Often the same committee will assist in developing the training plan. In smaller firms or where committees are not possible, an HR point person, COO, or other manager may lead this effort and carry out the work himself.

2.2   Assessing Training Needs

The major effort in creating a successful training program is determining what the firm's real needs are and how the training should be conducted. While it is the committee's responsibility to make these determinations, they should not make it alone.

A direct and efficient approach to assessing training needs is to go to the source, participants, and future users:

- Input from across the firm is essential. HR can conduct a two-tiered survey—one for the staff and the other for management—asking individuals for their input on their perceived needs and/or capabilities in terms of training.

- By compiling the survey results and finding disconnects in the responses of the various groups, HR can identify areas imperative for training.

- Not every program requested will be valid or a good fit—it may simply be based on personal interest. HR or the committee has to keep in mind that every element of a training program should ultimately be good for the firm as a whole.

A more sophisticated approach requires a strong definition and awareness of the firm's culture and vision:

- Although architecture and engineering firms sell professional services, they do not all approach that sale the same way. One can determine that approach largely by the firm's culture and vision. Depending what this approach or orientation is, the firm will base most of its training on it.

- This orientation is not clear for most firms but others are very aware—and their reputation in the industry reflects it. There are four orientations by which these firms are driven: project management, client service, technical, and financial. A firm that concentrates on technical training, for example, focuses on highly specialized, technically difficult projects. They are known for this expertise and have little competition. They require less business development training and place the investment instead in technical education.

- Most firms have an orientation that comprises all four and their training plans subsequently cover topics in all areas to achieve a good balance. A firm that claims to be the best civil engineering firm that has the best interests of its clients in mind will gravitate towards technical programs as well as those that improve client service.

2.3   Selecting Courses and Content

Even firms that do not have an established training and development program in place have employees that have at one time or another attended a course or seminar on some technical or business topic during their career. Others have certainly read information regarding programs available in the industry or through their professional associations. Many firms make this element much more difficult than it has to be. While the program is in the planning stages, the best practices to formulate a curriculum include:

- Soliciting input from employees in the firm that have attended technical and business programs that have been extremely informative and beneficial. These may be available from external providers but they should contribute to any of the core competencies formalized in the CDP.

- Search course directories of the relevant architecture and engineering societies for recommended continued education courses and programs.

- Utilize internet research to find other programs, seminars, and topics that may also supplement the program.

- Niche architecture or engineering firms may find it difficult to find technical programs that serve their needs or are advanced enough to keep an innovative firm on the edge. In these circumstances, courses will have to be designed and delivered in-house by the experts of the firm.

- Most firms have too many topics they would like to provide but not enough money to make it possible. Another mistake with new plans is trying to devise a system bigger than the firm requires. Do not try to educate everyone on everything in the first year of the program. A training program has to mature with the firm otherwise, it will be overwhelming.   Even very large firms start off with pilot programs so they are not working with more than they can handle and grow the program like any other area of their business.

Once a good list of course options has been formed, it has to be filtered and reduced to a more manageable and realistic list.

- Each program, course, or seminar has to be evaluated for its benefit to the program. Does it address one of the core competencies established? Courses without direct recommendation by an employee may require more research on what participants have had to say about the program or provider.

- Once the list of courses and programs has been filtered for fit, it has to be tested for feasibility.   Many programs may be cost prohibitive while others will be very affordable for large groups of employees. HR will have to determine what is possible for the year based on the budget it has.

- Not all courses will be available on a regular basis and not all programs are delivered the same way. Some are seminar style held once or twice a year while some are available frequently. Some are Webinars or recordings that HR can have available in the training library. Timing, class size, and availability will also determine what is possible.

- With the remaining courses, HR should build a master calendar of courses and programs. This should be published so managers and employees can plan to attend. As mentioned before, each course should be mapped to a track and competency.

2.4   Training Plan

- Training and development specialists in large firms build a master calendar a year ahead and discuss with managers which employees need to attend what courses. Managers know this from their CDP discussions with employees. The training specialist then works with her budget and through the year manages all the details of registrations and attendance.

- In smaller firms, the HR point person or other manager will maintain a master calendar but employees will be responsible for their own registration or other details.

- HRIS or career planning software programs area available or firms use spreadsheets to manage this function.

- When firms have limited resources of time and money, often a fixed list of programs is established within the CDP that do not change from year to year. This may include fundamental programs such as project management, advanced project management, technical programs like BIM, and other business courses.

- Once employees attend courses and advance through their CDP, they are responsible for updating their professional biographies or resumes for marketing and HR.   This is particularly important for project managers and other highly skilled designers as it makes their profile more marketable to clients and warrants a higher billing rate.

- Budgets will always dictate what the firm can offer in terms of training. Analysis of the business and employee needs will show that training is needed but a great deal of prioritization will have to take place. This prioritization is unique to the firm—but ultimately it should compliment the vision of the firm, the goals of the program, and the competencies established.

- It is advisable to have a good blend of different types of training—in-house, external, Webinars, or self-study.

2.5   Launching the Plan

- The training plan is typically launched together with the CDP. There are smaller firms however, that do not have career development programs but want training available for their employees.   In these cases, the training plan is launched with similar excitement, enthusiasm, and education.

- For firms that have existing programs in place but seek to refresh or improve their programs through these practices, a re-launch is recommended—with similar excitement.

2.2   Managing the Program

The primary role of the training or HR professional is to provide the day-to-day energy and oversight of the program. Keep in mind this program will always require support by senior management.

- Tracking: Typically, the HR point person or training specialist handles administrative duties such as tracking which employees are trained in what programs. The tracking programs also go a little further in that they not only track which employees have received which training, but also the career path of the employee through the firm.

- Direction: As the central repository for information about the specific needs of individual employees, the HR group can help lead the effort of staff and management to ensure that every employee is focused on getting the right type of training.

- Liaison: HR should be the training program's biggest advocate, communicating its value to management and staff while also representing the needs and concerns of both. In the most successful programs, everyone in the firm knows where to go for the most reliable information on the training and development program— usually the training or HR group.

In smaller firms, the employee also has the responsibility of entering training information into a system that tracks this information. Sometimes this is a spreadsheet available on a shared drive or it is a hybrid software system purchased by the firm.

2.3 Evaluating the Program

HR should ensure the training program and the courses contained within it undergo routine assessment to ensure it is working effectively for the firm and the participants.

2.1 Program Review

Similar to the CDP, HR should ensure the program itself is reviewed against the objectives it has set out to achieve. This can be done by:

- Conducting annual surveys with the users of the training program as well as the managers who directly benefit from the training their employees receive.

- Assessing the metrics and benchmarks used to establish the return on investment presented to senior management.

2.2 Training Course Review

When employees attend conferences or training courses it is recommended they complete a short review of the event summarizing primary lessons learned and whether they would recommend attendance to other employees.

Within a few days following the training session or seminar, the HR point person or manager should expect the employee to submit the following review questions:

- Within a few days following the training session or seminar, the HR point person should expect the employee to submit the following:

  - Why did you attend this event?

  - Describe how the event was of benefit to your professional development.

  - Would you recommend attendance at this event in the future? Why or why not?

- A brief line or two from each attendee is all that is required. This will provide a record for HR as it assesses future courses and their effectiveness to the firm and guide future attendance. Programs that do not receive favorable recommendations should be removed from the roster, as they will eventually have a negative impact on return on investment.

3.   INVESTMENT IN TRAINING

Investment in training is one area of the business that is often reduced when firms are facing financial difficulty. However, even when firms are thriving, attention to training suffers because teams are too busy on projects to take time off for extracurricular learning activities. Investment in training also often lacks the support of senior management because they fear the employees will take the training, leave the firm, and work for a competitor.

The reality is that employees leave firms because they do not receive training and can become easily discouraged at their jobs because higher skills are not taught. A firm's investment in training is an important statement—and signifies whether a firm values the employees or not. The best firms in the industry do not leave training up to chance and are fully committed to the process.

3.1   Making the Business Case to Senior Management

The best-designed and well-intended training programs can quickly become ineffective and useless unless there is full emotional and financial support by senior management. Everyone understands that training results in good things for the firm—senior management needs to be convinced of the return on investment. If firms want to increase the dedication and dollars spent on training, it has to first convince senior management it is worth that investment.

The business case for building a robust training program is based on the following:

- Often the specialist nature of the industry and the cutting-edge nature of the firm's role within it means that graduates and hires from the immediate industry are not ready to contribute and need additional technical training to become productive.

- A compressed training schedule enables a new hire to meet the firm's standard billability targets in a shorter period. Getting employees billable quickly recovers the cost of any additional time spent in training.

- Providing multiple training courses early in their career ensures that graduates entering the firm are sufficiently challenged and motivated. This provides benefit to the firm in terms of improved staff performance, decreased turnover, and provides new hires with a better appreciation of the opportunities and career paths that are open to them.

- Training courses that are not solely focused on technical needs instills a sense of ownership and loyalty. This result in better adherence to the firm's vision, standard operating procedures, and quality management than if new hires were simply placed in a technical role on a project. Trainees now have access to the bigger picture of what the firm wants to achieve.

- Asking the CEO, President, or other senior managers to design and present an in-house training session helps them see the value in the program. It also signifies to the firm that leadership does support these efforts. Likewise, senior management should always be invited to any in-house program.

3.1 HR's Role

As a primary duty to the employees of the firm, HR has the responsibility to present the business case to senior management and petition for the resources required to establish a quality program. Beyond the business case, HR should:

- Develop a budget for a training program that would include: start-up costs if the firm does not already have a program in place, costs of development of internal programs, costs of external programs including fee and travel time, unbillable time allotted to employees to attend training sessions.

- Provide a numerical return on investment to senior management that proves the success of the training program. This can take the form of decreased turnover, increased project profitability, increased employee utilization, decreased absences, and a decrease in new hires. It is important to note that many of these results will not be immediate but must be tracked over several business quarters to show trending.

- Return on investment may also be reflected in client satisfaction, quality of work, billing issues, and fewer change orders.

- The simplest calculation of return on investment can be determined by: Taking the total number of benefits of training and subtracting the total costs of the training; dividing that figure by the total costs; and multiplying it by 100%.

- For example, if the average billing rate for a drafter is 50JD, and his average chargeability is 75%; his work would earn the firm 78,000JD in one year (30 hours/week X 50JD X 52 weeks). If the drafter were to then undergo training that cost the firm 2,000JD (including fees, expenses, and lost billable time) and that training improved the drafter's productivity to the point where his average chargeability jumped to 80%, his revenue earned would increase to 83,200JD (32hrs X 50JD X 52). That is an increase of 5,200JD. Plugging that figure into the ROI formula yields an ROI of 160%.

- Constantly promote and improve the firm's training program as a means to individual and organizational success. Training programs that fail do so because no one talks about the program, how it positively impacts the bottom line, or assists employees in their growth. Firms can use personal case studies of employees to prove this point and use them as program ambassadors.

4. EMPLOYEE PARTICIPATION

4.1 Getting Employees Involved

Most firms approach training with the mentality that it should be optional and available for all employees. No employee should ever be forced to attend a training session.

4.1   Best Practices

- With success and excitement built around their training programs, firms have developed strong cultures that result in nearly 100% participation in training. This success begins with the hiring process—by hiring those that are motivated to grow and develop their careers.

- Less than 100% participation is not an indication of failure. Some employees will simply not have the interest. Others will have little relevant, ongoing training available in their sectors.

- Managers play a large role in encouraging employees to take advantage of the programs available and using those opportunities to advance their career. It is a strategic decision how the firm should approach employees with little interest in their professional development. Most firms look to move these kinds of employees out of the firm so they cannot negatively influence other employees.

- Most firms tie professional development to a more intricate incentive compensation plan. However, it should be clear that attending training alone does not guarantee advancement or salary increases. Performance evaluations will reflect the true advancements augmented by training.

- Many firms establish an online or internal presence for their program. This can range from simply posting the program curriculum on the company intranet, to having a completely interactive process online whereby a training participant can sign up for classes and events, check progress, and submit information electronically. This makes using the program easy.

- Successful firms reference the training program as frequently as they do other aspects of the business—like finances, proposals, and clients. If management holds an annual strategic planning session, it should include a training and development piece along with other business areas addressed. They also include training as a small subset of an overall human resources piece. Firms that take this approach—treating training and development as one of the few critical areas to focus on in an A/E firm— are most likely to create good programs and see high levels of participation.

4.2 Common Mistakes to Avoid

- Failure to inform the staff about the availability of training and development opportunities. Even firms with tremendously successful training programs have struggled with the critical task of creating an effective communication process to inform people about the program. While not the most pressing challenge, establishing a workable communication process usually demands more time and effort than expected.

- Not ensuring that people understand the process for participating. In some firms, the people targeted for training are not properly instructed on participation. They do not know what forms to fill out or who to go to with their requests or inquiries. Once they

are approved for a training opportunity, they may not know the requirements for successful participation or the process for submitting expenses. A firm can have the most sensible, efficient process in place, but if employees do not know what it is, it is useless.

- Failing to communicate the benefits of the training and development program. While most principals recognize the importance of training, not everyone else does. The CFO might ask why the firm should spend its hard-earned money on an overhead item like training. A project architect might ask why he should spend time on training when he could be working on a project or enjoying a quiet lunch with friends.

CHAPTER 4

MENTORING PROGRAMS

Mentoring and training are not the same thing. They serve different purposes, generally take different amounts of time to carry out, and require different skill sets in transferring knowledge.

In contrast to training, mentoring happens every day within firms. The mentor and mentee may not be cognizant that it is happening and it does not always occur under the guise of a formalized program. Mentoring

1.   MENTORING OBJECTIVES

All firms will approach a mentoring program with different agendas, styles, expectations, and objectives. Most commonly, these include:

- Fostering supportive mentoring relationships focused on the professional development of each company intern

- Motivate and encourage individuals to reach their full potential within the industry

- Guide and counsel individuals on networking and learning opportunities

- Promote the exchange of knowledge, ideas, and information

- Develop relationships between an individual and staff at all levels

1.1   Program Best Practices:

- It requires a large amount of work and effort to have a full training and mentoring program running simultaneously in a firm. For this reason, firms typically over 150 employees will have both systems—and even then with less focus on the mentoring.

- Mentoring programs are intended to be temporary—whether three, six, or twelve months in a formalized program. The goal is successful on boarding—or educating the new employee or intern on aspects of the business or industry essential for their immediate success.

- When programs are not formalized, it is widely acknowledged that mentoring should be taking place on a regular basis among all employees. Employees with longer tenure may pair up with a mentee and serve as a "mentor" over a longer period but this relationship is informal and is not tracked by the firm.

- Often a sophisticated orientation program can take the place of a mentoring program for new employees.

- A formalized mentoring program is a complement and supplement to the firm's wider professional development program. While a formalized mentoring program is nice to have, this may not be possible if there are financial or resource constrictions. A solid training program can easily make up for a lack of a formalized mentoring program.

- Mentoring programs in architecture and engineering firms are generally reserved for new employees or interns. Other employees receive formalized training and coaching through their CDP or executive coaching at the managerial level from an external coach.

2.   DEVELOPING A MENTORING PROGRAM

For the firms that choose to develop a mentoring program, there are two different approaches the firm can take—formal or informal. There are pros and cons to each program and the firm will have to decide which program best suits its needs and budgets.

2.1   Informal

The informal program is very loose at every level. A senior person within the firm imparts experience to a younger staff member with the purpose of helping them navigate their way through the industry and their career. These can last for years and represent a very special bond.

2.1   Key Points

- Mentors and mentees do not consciously decide and agree to pair up in a mentor relationship. Generally, both will gravitate towards each other through common interests and discussions.

- The mentor is not necessarily the mentees direct supervisor. Often it can be someone from a different group.

- There are no formal meetings or formal discussions that take place and HR may or may not necessarily be informed that the mentoring relationship exists. In fact, the pair may not acknowledge it is occurring since it may happen naturally. It may also end at any moment without particular reason.

2.2   Formal Program for Interns

At architecture and engineering firms, the formal mentoring program is reserved for new employees and interns. This program can span from three to six to twelve months. Anything longer should be considered a career development plan.

2.1   Objective and Best Practices

- The objective of a mentoring program for interns is to immerse them in the culture and initial workings of the firm—so they return to work there after graduation.

- Contrary to training, not every employee is involved in a formal mentoring program. Participation of the mentor is voluntary and HR invites employees who have outgoing, nurturing personalities to serve as mentors.

- Being a mentor is not reserved for senior leaders. In fact, it is beneficial to have a younger member of the staff mentor the intern since they can easily convey experiences fresh out of school.

- Establishing a program for interns should not be made more complicated than it has to be—particularly since the intern will not be working at the firm for an extended period of time.

- Financial obligations for a mentoring program are far less than a formal training program but they still require a time commitment.

- Interns view working at the firm as an opportunity to practice what they have learned in school and to see architecture and engineering in action. Some schools or programs may even require internship time and the intern often will come to the firm with a pre-established agenda of technical topics to learn.

2.2   Before the Intern Arrives

- HR will know when the intern will begin working at the firm. In advance of that arrival, she should invite employees to participate. Most often the employees with the right characteristics of firm loyal, passion for the industry, and outgoing nature will apply. HR groups have more difficulty recruiting mentors since people are very busy.

- HR will select an intern similar to the approach of hiring a full-time employee. The intention of mentoring an intern is to have them join the firm eventually—so it is essential to view interns as future employees.

- The size of the firm will depend on how many interns the firm takes. Interns also view this relationship as future employment, so to bring on many interns because they provide cheap or free labor is misleading and very unprofessional.

- During the interview process, the intern will discuss his person and professional goals and his reason for choosing the firm. He will also discuss his coursework, accomplishments to date at school, and convey what areas of practice and skill he would like to gain. It is from this discussion that the mentoring agenda will be set. It is not established by the firm—the firm simply provides the environment and mechanisms for the intern to learn.

- HR will brief the mentor on the intern's background and requirements. This allows the mentor to know which projects over the duration will satisfy the intern's requirements. He also ensures most or all of those requirements can be accomplished.

2.3   When the Intern Arrives

- When the intern arrives, he should be given the same orientation a new employee would receive and the mentor would deliver this information.

- During the first few days, the mentor and mentee should sit together and discuss the program to validate the intern's goals. The mentor can also begin to describe some of the project opportunities that would fit the intern's requirements.

2.4   During the Internship

- The mentor does not have to work side-by-side with the mentee during this tenure. In fact, a mentee can be assigned to work under several different teams performing several different tasks.

- Depending on the duration of the internship, the mentor and mentee should meet to discuss progress, comfort level, overall expectations, and even surprises. These are designed to be touch points rather than formal evaluations. These meetings can happen at lunch or on a coffee break. More importantly, they occur to make the intern feel at ease.

- The mentor's role at this point in time is to share his experiences and feelings that he had in exactly the same scenario—either as an intern or a new employee at the firm. When the mentor talks about common experiences, the intern can reframe the situation with a broader perspective.

- The mentor will be sure to introduce the intern to specialists in the firm—so the intern can practice a particular skill or simply have a conversation about their field of

expertise. Especially if the intern is considering a specialty at school, this is a great time to investigate it.

2.5 At the End of the Internship

- As the internship period ends, it will be very important for the mentor to check if the requirements of the agenda have been fulfilled. Depending on aggressive agendas, that will not always be possible.

- HR will make sure the intern has all official paperwork required by his school.

- HR should also talk to the intern about the quality of the program and make suggestions for improvement if warranted.

- Because the firm has gotten to know the intern fairly well during this time and hopefully accepted him as part of the team, the firm should have a farewell party or lunch. A company shirt or small gift should be presented.

- Since the goal of the program is to eventually hire the intern, the mentor should stay in touch with the mentee and encourage them to apply. Because both the mentor and mentee will be busy, it is only necessary to touch base every quarter.

2.3 Formal Program for New Employees

A formal mentoring program for new employees will be similar to the Professional Peer role described in the first chapter.

2.1 Objective

- The objective of this program is to reduce turnover or disillusionment during an employee's first year or first several months.

- The mentor's role is to be an easy-to-access, non-threatening point of contact to help new employees become acclimated to the firm and the office. The mentor monitors the new employee's progress, occasionally using a company reimbursed lunch outing as a way to get together and see how things are going.

2.2 Mentor Selection

- This mentor is not the supervisor but usually someone closer in age and experience to the new employee. It is a relationship where the new employee can ask any question and rather than going to the boss and being afraid he might look dumb.

- The important factors for selection include availability to spend time with the new employee and his willingness and interest as mentioned before. An ideal candidate is someone that is excited about the firm and wants to spare a new employee from the challenges he faced when starting.

- Mentors can also be selected from different operational or technical groups to increase the new employee's exposure to other staff.

2.3 Mentoring

- The length of time for the formal program may vary from firm to firm—but depends largely on size. Even though the formal program may end, this relationship and friendship continues.

- In addition to the orientation program and package the new employee will receive, HR can develop a more extensive checklist for the mentor to work with during the mentoring period. The length of the program will dictate the agenda.

- It is important to remember that the mentoring program does not take place of the CDP or training. Even though this arrangement is considered formal, there are no formal reviews that take place.

- Some HR groups will mandate quarterly lunches and will track these are happening by looking for the expensed lunch receipts. Everyone is busy and it does take an extra effort to fit time in one's schedule for the mentee, so making it a requirement keeps the mentors on track.

- The HR checklist might include accompanying the mentee to a project site, a company outing, or attend an appropriate training session together. With items like these on the checklist, it is easy to see how the program could span a calendar year. Depending on the personality of the new employee, he may adapt very quickly to the environment and feel he can reach out to or confide in others during this time. This is human nature and should be encouraged—however the formal aspects of the program—such as working through the checklist should still be completed.

2.4 End of the Program

- Once the checklist is complete, the formal portion of the mentoring period is over. This does not mean the relationship ends or the ability to confide or seek guidance is over—this now becomes a close professional relationship between colleagues.

- HR and the employee should also review the quality of the program and make suggestions on improvement. At this time, HR should encourage the employee to become a mentor himself.