

CERTIFICATE

# COMPETENCY MODELING

# DEVELOPING THE TRAINING MANAGER

## COMPETENCY MODEL™

### SUMMARY

Training Industry's Training Manager Competency Model™ was developed using subject matter experts (SMEs) through both qualitative and quantitative job analytic methodologies. The model was validated using a sample of training managers and learning and development (L&D) professionals, who work directly with training managers as their supervisors, subordinates or co-workers. The results of the research showed overwhelming agreement across sources regarding the core responsibilities of a training manager and the competencies needed to perform them successfully.

Today, this model forms the foundation of each program within the Training Industry Courses catalog, including the flagship Certified Professional in Training Management™ program.

### BACKGROUND

#### Company

Training Industry, Inc. is the most trusted source of information on the business of learning. Since 2006, Training Industry has served as a resource to training professionals to help them get the information, insights and tools needed to more effectively manage the business of learning.

We serve as an expert resource for learning professionals seeking information about best practices and innovative approaches for developing effective training. We create an environment for trust and information sharing among learning professionals, including those in the L&D function and experts from companies serving the training industry.

On our website, [TrainingIndustry.com](https://www.trainingindustry.com); in [Training Industry Magazine](#); and in our [webinars](#), [events](#), [podcast](#), [research reports](#) and [courses](#), we focus on the professional needs of the learning professional. Our aim is to provide the information, insights, and resources needed to elevate training manager careers, confidence and effectiveness.

#### Training Manager

Training Industry's director of training and development, Amy DuVernet, Ph.D., CPTM, is responsible for managing all processes related to the development and delivery of Training Industry Courses. This includes needs and gap analyses research to identify learning and development professionals' competencies, training needs and career paths. She has extensive experience conducting job analyses and competency studies in numerous organizations.



## Reason for the Competency Modeling Initiative

The Training Manager Competency Model™ grew out of a program of research launched in 2008 to identify and explore the traits of high-performing training organizations. Results of Training Industry's flagship annual study conducted over a decade have linked eight key processes and 52 best practices to high-performing training organizations (N = 2,225 learning professionals; over 1,500 organizations ) and identified training managers as a critical factor in the success of a training organization. Which is unsurprising, given that training managers set the direction for the training organization.

Training professionals must balance often competing needs and priorities to make important decisions for the organization, including identifying the needs of their learners and their organizations, developing and delivering effective learning solutions, assessing the impact of their initiatives, managing complex learning technologies and much more.

These responsibilities, and the changing landscape of training, require highly skilled professionals; however, while most L&D professionals recognize the importance of focusing on employee development, their own development is often overlooked. Therefore, Training Industry set out to identify the key competencies of a training manager with the goal of developing L&D programs designed to prepare training managers for their important role.

## Challenges

A major challenge that we knew we needed to address was the need for this model to be widely applicable across the many variations of the training manager job role. Training managers work in very different companies, across very different industries and, in some cases, in different kinds of departments or teams. Depending on the context of the role, training managers may manage teams of many L&D professionals or work as the only training professional in their organization, in which case they are likely serving as not only the training manager, but also as the instructional designer, facilitator, etc. Defining competencies across these variations meant that the model had to be general enough to be widely applicable as well as specific enough to be useful in the determination of critical professional development needs. For these reasons, it was important that we gathered perspectives from a variety of SMEs and examined agreement across contexts very carefully.

## Planning Phase

Timeline:

- **Study 1: Development**
  - Define competencies; all background research complete; focus group presentation prepared.
  - Focus Group 1 recruitment and interviews.
  - Focus Group 2 recruitment and interviews.
- **Study 2: Validation**
  - Define sample strategy.
  - Survey development.
  - Survey launch.
  - Close survey.
  - Analysis, including interrater reliability.
- **Model Finalized**
  - Final SME check.
  - Model visualization.
  - Model report written and released.

## GATHERING INITIAL RESEARCH

To begin understanding the competencies associated with training management, we first conducted an extensive review of existing literature related to training management and the associated skills and abilities. Using this review, Training Industry's team of training management experts began to develop a draft competency model by compiling a list of relevant competencies and their definitions.

## DRAFT MODEL REFINEMENT

To refine the list of relevant competencies and identify additional, potentially relevant competencies, we conducted six small focus groups with both training managers and individuals who supervise training managers. In these focus groups, participants were asked a series of structured questions to identify any missing competencies that enabled successful performance of training manager job responsibilities as well as to review identified competencies for relevance and potential revisions. Based on feedback from these focus groups, 45 competencies aligned with seven core training management responsibilities, along with one foundational area. The feedback was also used to refine competency definitions, ensuring accuracy and relevance to training management.

## VALIDATING A DRAFT MODEL

To validate the draft model, a job analytic survey was conducted which asked respondents to rate the importance and the frequency of performance/use of each training manager job responsibility and competency. Using a total of 358 survey responses, from individuals who were either training managers or supervisors, the data were analyzed to determine the level of agreement between survey participants and to identify the most (and least) important competencies. Agreement was affirmed both within incumbents (training managers) and their supervisors, and across the two different types of respondents. From this analysis, the model was finalized to include only the competencies that were considered most important.

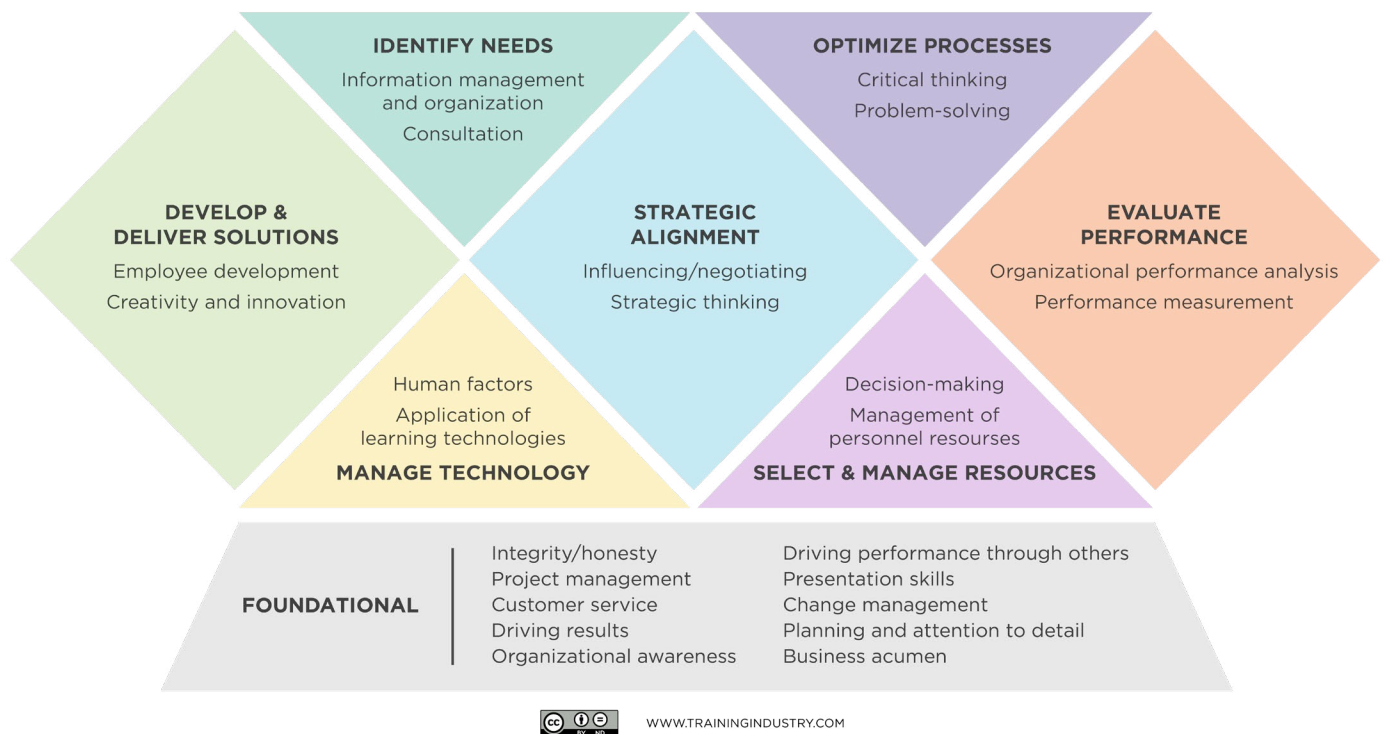
## FINALIZING THE MODEL

The final model included 24 competencies, organized around seven core responsibilities and one foundational area. Having defined the core responsibilities and competencies, the next step was to visualize the model. This step was important to ensure that the model was clear and was presented in a way that effectively communicated its contents.

### Visualizing the Model

To create the visualization, our team met with creative and graphic design experts to decide on the appropriate format and organization of the model. This included considering model structure, important visual elements (such as color and shape), the creation of a visual hierarchy and the ability to emphasize the alignment of competencies to the training manager core responsibility that they support.

The final model, pictured below, places the most important training management responsibility, strategic alignment, aptly front and center, surrounded by the additional six responsibilities: developing and delivering solutions, evaluating performance, identifying needs, optimizing processes, managing technology, and selecting and managing resources. Along the bottom lie the foundational competencies associated with more generalized management responsibilities.



Today, this model serves as the foundation for our ability to provide targeted professional development resources for training managers and other learning leaders.

## APPLICATION

All of Training Industry's courses are founded in the Training Manager Competency Model™. Below is a sampling of some of the applications of this model in the work that we do.

- 1. Portfolio review and update:** All Training Industry courses are designed to align with at least one training manager competency. Each course has been reviewed against the competency model, by collecting SME ratings of the extent to which each course covers each competency. These ratings are then used to identify revisions to existing courses, that may need additional content, as well as to identify gaps in competency coverage across the Training Industry Courses portfolio. Where gaps are identified, courses are then added to the catalog based on their ability to address those gaps.
- 2. Certification:** The Certified Professional in Training Management (CPTM™) program provides the most comprehensive coverage of the competency model and is founded on this body of knowledge. Successful completion of the certification program validates a training manager's capabilities in these areas.
- 3. Individual assessment with guidance:** In order to facilitate training professionals' self-assessment and professional development, the **training manager competency assessment** is offered on a self-serve basis and offers personalized feedback and guidance based on each survey taker's responses.
- 4. Team assessment with guidance:** Similarly, Training Industry Courses offers guidance on developing your team based on their performance in these competencies. **Training Industry's team assessment process** collects data across team members to understand strengths and opportunities for development within an L&D team.

## MODEL MAINTENANCE

As work and L&D processes evolve, it's important to continue to test and validate the Training Manager Competency Model™. For this reason, we gather data to validate the model on an ongoing basis. To date, more than 1,000 training professionals have provided ratings of the competencies within the model. Our research has shown that the competencies and core responsibilities have stood the test of time in terms of their importance and frequency of use. If you're interested, you can see up to date benchmarking results in our real-time **Training Manager Competency Model™ dashboard**. You can click [here](#) to learn more about the Training Manager Competency Model™.

## RETROSPECTIVE

### What You'd Do Differently:

If I could start over, I'd love to also collect data on the competencies needed for the supervisors of training managers. We're planning to expand our catalog to focus on the next step in training managers' careers. Having historical data on those critical competencies for the next level would be very helpful as we approach this expansion of our course catalog.

### Advice to Others:

1. Always assume that competency modeling will take longer than expected. Plan for multiple phases and multiple check-ins with key SMEs and stakeholders.
2. Be sure to include diverse perspectives; it's so easy to overlook a critical component when the SMEs you include are too similar.
3. Build in flexibility so that your model can be revised to accommodate changes in the job role or the purpose of the model.
4. Consider future needs. How will this model be used five years from now? Can you anticipate those needs and plan for them now?

We at Training Industry hope this case study offers you greater insight into both our Training Manager Competency Model™ and the competency modeling process as a whole, and that you can apply some of these best practices to your own organization's competency modeling initiatives.

