

CROSS TRAINING YOUR BUSINESS OFFICE STAFF

AASBO Certificate Program

September 18, 2018

- Building an effective and efficient team with:
 - Team Building
 - Delegating
 - Cross Training

TEAM

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Your Office Team

- Interdependent group of employees who unite around a particular task, project or objective.
- A team is a way of organizing different people with different talents, skills, and knowledge into a cohesive whole.

Your Team's Purpose

- Support system for teachers and administrators
- Transaction management in the area of business and finance.
- Reporting and compliance
- Integral part of the school district to support the district's mission, beliefs and goals.

Coach/Leader

- Who is the Coach/Leader of the team?
- What are the Coach's responsibilities?
 - To Lead
 - To Teach
 - To Mentor
 - To Friend
- Communicate
- Motivate
- Counsel
- Delegate

Office Relations

- Culture
- Relationships and Personality
- Confidentiality
- Communication
- Transparency and Accountability

Determining Key Players & Positions

- Organization Chart
- Office Relations
 - Communications
 - Transparency
- Assess Current Staff
- Review and Develop Job Descriptions
- Delegating
- Professional Development Plans

Delegating

- Improves Efficiency
- Empowers Your Team
- Builds Trust
- Improve Sustainability

Delegating

- Empowers your finance team and give them freedom to do their jobs.
- Delegating responsibility shows your team members you trust them.
- You give them opportunity to develop new skills.
- You must provide your team members the training, information, resources and support necessary to do the job.
- Review effectiveness ("Trust but Verify")



Cross Training

- Cross training – is when employees are trained to perform more than one job in the district, even though they typically perform only one.
 - Cross training makes an employee more valuable to the district since that person can perform a broader set of work tasks.
 - Employees learn more about the work perform in the district as they learn multiple jobs and increase their skills.

Cross Training

- "Flexibility" has become one of the biggest business buzzwords of the 21st century – and for good reason.
- Cross-training offers flexibility by giving your employees the abilities they need to "fill in" roles outside their primary job responsibilities.

Why Cross Train

- Increases flexibility to manage and sustain efficient operations.
- Equips the business office with the staff needed to recover quickly to workflow disruptions and handle transition gracefully.
- Employees that are knowledgeable in multiple areas makes it much more manageable to continue operations if someone is out sick, takes vacations, have family illness or unexpected quits.
- Allows staff to constantly learn new tasks and responsibilities thereby enhancing their professional growth.

Why Cross Train

- Allows your team to refine processes by making them take a closer look at the procedures as they train others. It makes them answer questions, explain their processes and see the tasks they perform daily through a different set of eyes.
- Employees' skill sets are duplicated and employees have the opportunity to learn different things, develop hidden talents and prepare for advancement in the system.
- Increases the employability and professional skills of employees who have the opportunity to train in areas they were not originally hired to do.

Why Cross Train

- Cross training provides on the job professional development, challenge and empowers staff to make collaborative decisions.
- Cross training provides an opportunity for employees to build new relationships while allowing employees to understand various roles in the business office and how they connect.
- It will help your team work more effectively and increase employees' understanding of the organization's goals and big picture.



Benefits of Cross Training

- Reduce cost by leveraging internal talent
- Groom employees for promotions, management, and additional responsibilities
- Save productivity even when employees are absent.
- Foster individual and group morale, positive attitudes and cordial relations.
- Boost motivation by in employees' career growth.
- Staff more strategically.

Benefits for Employers

- **Mitigate risk.** With cross training, organizations are better equipped to recover quickly from disruptions and handle transitions gracefully. To be specific, employees will be able to easily step into other roles to make sure the job gets done especially in the event that a key employee leaves.
- **Discover leaders.** Cross training can uncover some people's hidden talents. Companies may see an employee not only be able to learn and perform new duties but emerge as a leader and motivator to others.
- **Enhance teamwork & boost morale.** Cross training helps employees to appreciate each other's jobs and recognize all the duties of their co-workers that they may have overlooked before.

Benefits for Employers

- **Higher efficiency & productivity.** Cross training forces teams to refine processes by making them take a hard look at the way they do things as they train others.
- **Recruiting tool.** Today's young workers want greater satisfaction from their work. They are geared toward seeking employment that allows them to learn new skills. Therefore, employers are more likely to attract and keep good employees.
- **Derive Cost Savings.** Depending upon the business, once employees have been cross trained, a company may not need to hire as many workers. Additionally, employees improve and increase skills enabling them to work in multiple areas. The business should see costs go down and efficiency go up.

Benefits for Employees

- **Growth opportunity.** Cross trained employees may be considered for a promotion faster than others. Employers may find that an employee has a special talent in a different role.
- **Increase employee satisfaction.** Employers that cross train have noticed a decrease in employee boredom and stagnation and an increase in productivity and value.
- **Develop new skills.** Cross training allows your employees to build their professional, technical, and soft skills. By building their skill sets they feel more confident and valuable to the organization.

Benefits for Employees

- **Build teams & relationships.** Cross training gives employees a chance to build new relationships with people they might otherwise never have contact with. These relationships will help with teamwork and gain a better understanding of the bigger picture.
- **Higher motivation.** Recognition in the form of training and development works wonders for employee motivation because it's proof the company is investing the necessary time and resources for employees to acquire new skills. An employee who believes their employer is genuinely concerned about their career development, is likely to exhibit an increased level of job satisfaction and motivation.

Cross Training

Positive Affects

- Supervisor can detect their most valuable employees.
- Enhance teamwork and increase productivity.
- The school district saves in labor cost by having their own coverage versus hiring temporary coverage.
- Benefits the system if an emergency happens to occur and your short staff employees will have the ability to pick up the work load verses having to hire a temp.

Negative Affects

- May create some competition between employees .
- Employees may feel tired and over worked.
- Some employees may feel threatened by someone else being trained.
- Some employees may feel they are being taken advantaged of.
- In case of an unplanned emergency/absence, the supervisor will have to do the job or hire a temp to fill in for the employees.

Cross Training Implementation

- Carefully select the employees to be cross trained.
- It should be carefully planned and presented as a learning and career opportunity.
- When planning cross-training consider costs, "acceptance" and cooperation by all departments.
- Custom tailor the cross training to the needs of each individual and the organization.

Cross Training Implementation

- Evaluate current staff assignments, job duties and responsibilities.
- Identify areas and tasks to be cross trained.
- Identify who has the skills and/or potential to develop the skills for tasks.
- Communicate cross training plan with staff and gather input.
- Carefully analyze employee resistance on an individual basis.

Cross Training Implementation

- Some positions require longer to train.
 - Breakdown the jobs of the most difficult position and train one job at a time.
- Choose the easier jobs/tasks first.
- Provide adequate time for training. Don't rush.
- Choose the trainees and trainers with great consideration.
- Hold meetings and allow trainees and trainers to report on progress.

Cross Training Implementation

- Cross-training steps:
 1. Task identification
 - Identify the tasks performed for various jobs and designate which ones could be successfully performed by other people.
 2. Voluntary participation
 - Identify who is interested in participating in the program. It may be counterproductive to force someone to participate. Decide how to deal with this situation.
 3. Cross-train
 - Cross-train members of the same team. It's a natural learning process for one team member to pick up skills from another.

Cross Training Implementation

4. Specialized skills
 - Identify who has the competencies to perform the tasks designated as cross-trainable. Determine what proportion of a team member's job can be reasonably shared with other team members.
5. Coaching
 - Apply coaching skills to the process. Cross-training is at the challenging end of the learning curve, involving major portions of employees' jobs rather than a task or two. Those who do the training – whether it is a fellow employee or the manager – need to understand the appropriate coaching behaviors to apply at each stage in the process.
6. Reduce workload
 - Reduce workload during training and while tasks are being performed. Otherwise, the people involved may feel resentful about the process.
7. Recognize and reward
 - Recognize and reward employees that have new skills and/or responsibilities.
8. Development plan
 - Incorporate the cross-training process into an overall development plan for an employee.

Cross Training Implementation

- Development a training process with realistic expectations and determine who will provide the training.
- Test the success of the cross training by reassigning duties when one staff member is absent or by alternating performance of tasks.
- Provide feedback to your staff and recognize members who are put forth their best effort during the cross training.

Methods of Cross Training

- **Hands-On Training**
 - Hands-on training provides direct training and offers several more effective techniques for teaching employees.
- **Demonstrations**
 - Demonstrations are attention-grabbers. They are an excellent way to teach employees to use new equipment or to teach the steps in a new process. Combined with the opportunity for questions and answers, this is a powerful, engaging form of training.

Methods of Cross Training

• Coaching

- The goal of job coaching is to improve an employee's performance. Coaching focuses on the individual needs of an employee and is generally less formal than other kinds of training. He or she gets together with the employee being coached when time allows and works with this employee to:
 - Answer questions
 - Suggest more effective strategies
 - Correct errors
 - Guide toward goals
 - Give support and encouragement
 - Provide knowledgeable feedback

Methods of Cross Training

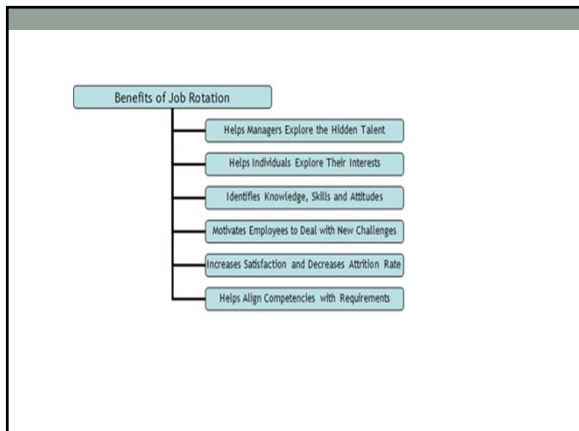
On-The-Job Methods

- Cross training employees can be done in several ways, but the best method is through direct, practical on-the-job training.
- On-the-Job cross training and practice sessions also allow organizations to closely evaluate the progress of their personnel, and examine their performance on a regular basis.
- Using this method will require instructions for trainers on how to teach others.

Cross Training Methods

• Job Rotation and Cross Training

- Job rotation is an important concept. Moving people around to different tasks may be done on a set schedule or on an as need basis.
- Cross Training is a prerequisite for successful job rotation.
- Job rotation will:
 - Help employees gain experience
 - Improve and maintain cross training skills of employees
 - Prevent boredom
 - Share best practices



| ABC City Schools Finance Department Cross Training Plan | | | | | |
|---|------------------------------------|--|---|---------------------------|----------------------------|
| CROSS TRAINING AREA KNOWLEDGE/SKILL | STAFF WHO NEED(S) KNOWLEDGE/ SKILL | STAFF WHO WILL PROVIDE NEEDED KNOWLEDGE/ SKILL | TRAINING METHOD(S) | IMPLEMENTATION MONTH/DATE | SUCCESSFUL COMPLETION DATE |
| Bank Reconciliation | Linda McGhee | Marcena Bryson | <ul style="list-style-type: none"> Software Documentation Hands On Method | November 2018 | |
| Requisition Processing | | | | | |
| Invoice Processing | | | | | |
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Cross Training

- Successful cross training helps to build a culture of collective success with employees that understand various roles and how they connect in the organization.
- It may also help in eliminating the terms “that is not my job” and “I don’t have time to cross train” to create a team with the mentality of “how can WE get the job done.”
- Cross training can be very beneficial to your business office as a whole.

Cross Training

- Think of cross training as insurance and a disaster recovery plan.
- Implemented correctly, it will help a your office to run smoothly in the event there is an absence of one or more key players.
- Employees should think of cross training as a way to become more valuable to the company.
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Cross Training

- Cross training efficiencies will pay off big in the end.
- Facilitate succession planning.
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Cross Training

- It is important to remember that cross training is a form of investment, and like all investments, it poses certain risks to the investors.
- With cross training, organizations are investing in new skills for their personnel. If these skills prove ineffective or impractical in the future then the investment is a loss.
- Cross training efficiencies will pay off big in the end.
- Facilitate succession planning.





Tom, we're letting you go, but we'd like you to stay on and train your replacement so they know what not to do."