Building a consistent approach across broad enterprises

an interview with
R. Brett Short

> " Most importantly, wear your boots; it is not a matter of if you step in "it," but when you do, you've got to be prepared. "

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Why aren't more organizations cross-training effectively?

» Despite published benefits, many organizations aren't implementing effective cross-education programs, in part or whole, due to perceived challenges.

» Often, even when implemented, cross-training is not beneficial to the organization due to failures in establishing the program.

» Barriers, while present, are not insurmountable if approached proactively.

» The benefits to your organization for cross-training remain paramount to challenges in implementation, but implementation is key.

» Learning from others' experiences within your industry can ensure implementation and long-term program success.

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As I prepared this article, I realized the topic truly isn't novel in nature, so no shortage of articles and reference materials touting the benefits of cross-training exists. In fact, across multiple industries and over the span of the last two decades, one can find hundreds of articles with a simple search at the keyboard. And yet, this topic remains timely and relevant—so why? Perhaps, and I base this on both personal and client experiences, it's because cross-train-ing continues to break down when it comes to implementing the actual process and maintaining an effective system with often limited resources. And why are those resources so limited, I wondered, especially with the plethora of literature espousing the endless benefits of this straightforward initiative.

If our respective industries aren't disput-ing the benefits of this concept, and continue to discuss multitudes of variables for bettering

it, one would think implementation would be a given. So, in effect, as I looked harder and harder for what truly makes cross-training a timely topic, I actually found the real ques-tion is: Why aren't organizations using this concept, given all the positive literature? Thus, instead of writing yet another article tout-ing the benefits of cross-training, I decided to instead examine why organizations aren't completing this process effectively—or at all. Perhaps if the hurdles and stop-gap measures are evaluated and demystified, then greater strides can be made to productively use all the existing literature I initially found.

Defining cross-training

First, one must understand the concept of organizational cross-training, and the ben-efits, before we can explore what might be perceived as the obstacles to implementation. Your organization can potentially overcome those challenges to reap the rewards.

In short, "cross-functional training means teaching employees to do jobs they currently do not do and were not originally hired for."[1] This concept is applicable in almost all

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employee positions and across practically all industries.[2] Commonly, you see it applied most effectively in various customer service representative and high customer-contact scenarios or in retail organizations. Yet, based on the litany of articles available, healthcare-based organizations are struggling to implement cross-education on a comparatively regular level.

Perhaps a deeper definition is truly required to be understood and digested for what appears to be such a straightforward concept to succeed in implementation. As I looked further, I came across a far broader definition that helped in this regard: "Cross-training means changing the way the employer thinks and training employees to learn a variety of job functions within his domain."[3] This, I determined, was foreshadowing as to why this seemingly simple concept was far more difficult than it appeared to be when employed in institutions.

Benefits of cross-training
Once employed successfully, cross-training allows for several distinct benefits to your organization.

Flexibility in the workforce scheduling and risk mitigation
The more employees understand certain tasks or duties, the easier it is for management to equitably distribute the workload. Additionally, your organization can better mitigate risks related to lowered production time due to unexpected employee absences, keeping shareholders and customers alike satisfied.

Improved employee coverage
Employees will know, and your organization can endorse, that taking paid time off is reasonable and encouraged, because one employee isn't the only person who handles a certain job. The one thing worse than being a manager trying to absorb unforeseen employee absences into your work plan is being the employee who can't take a vacation or sick day because no one can cover for you.

Employee satisfaction and engagement
Cross-training offers employees a break from their regular duties to rejuvenate and reduces potential turnover when employees receive new challenges and exciting tasks. This piece will inherently save your organization money as your turnover rate decreases, as well as creating higher chances of retention for employees during layoffs, which benefits the organization *and* the employee. As an added bonus, productivity will also increase over time as your management spends less time in the employee recruiting realm.

Skillset evaluation of employees for management
Any time management has cause to migrate employees among departments and responsibilities, it should be seen as an immediate opportunity for management and the employee. Management garners a free evaluation of their organizational chart and those within certain roles, while employees have an opportunity to discover and demonstrate their depth throughout the organization.

Employee mutual respect and collaborative team environment
When working within large organizations, subdivided groups often struggle to comprehend and empathize with those in less visible roles and departments. This mentality can cripple a workforce from truly interacting as one team and thus prevents creating a positive, thriving environment for your institution. Cross-training can be used to address the educational need or to diffuse tension and conflict within your organization. Use it for both, and you'll likely build a highly collaborative team.

Improved customer support and contentment
Customer satisfaction in the healthcare industry is at the absolute core of every provider, far above and beyond simple potential financial gain. We chiefly aim to not only save and prolong lives, but to improve their quality. Having a cross-trained workforce to ensure patients receive seamless care could make the difference in not only outcomes, but especially in avoiding compliance nightmares at your institution.

Although the above listing is not intended to be exhaustive, the most commonly found benefits are clearly covered from a perusal of the extensive literature search I referenced in the above paragraphs. This summary brings us back to my true hypothesis: With all these apparent, positive effects on your organization, courtesy of cross-training, why aren't more institutions focusing efforts toward creating and maintaining an effective program?

Challenges to implementation
As a reminder, this article isn't addressing the self-evaluation step of whether your organization is in need of cross-education. Rather, I am acting on the presumption that if your organization isn't already taking these steps, you're aware it is needed. Based on that assumption, let's examine just what those hurdles truly are for your organization when considering cross-educating your workforce.[4]

Time and resources
Creating and maintaining an effective cross-education plan will require the investment of time and money by your organization. Further, at least one person within your organization

must possess the expertise to establish a cross-training program successfully, or one of the required investments will be outside training on this topic. Lastly, you will have to part with at least a small percentage of employee productivity as time is dedicated to establishing the program, whether as setup or the act of being cross-trained.

Employee morale
If communication regarding outlay of the cross-education program isn't handled delicately, the mere attempt to create the program will prove to be your largest challenge. Employee engagement and endorsement is a critical component of success for cross-training to succeed. If employees feel their jobs are being threatened in *any* way by the establishment of this program, you will face internal conflict, competition, and quickly diminishing employee morale. Moreover, if your workforce misperceives the organizational motives for creating cross-education, employees could quickly feel underappreciated, resulting in even further effects related to low morale, such as resignations and loss of productivity.

Loss of specialized knowledge
Fearing a loss of specialized knowledge is often understood at the employee level, but organizations as a whole also struggle to embrace a new way of approaching operations. This all-or-none approach, that employees must either be informed with a small percentage of expertise across highly broad areas within your business or be absolute masters of one area of subject matter only, is in itself

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the challenge that must be overcome by your organization.

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Although the summaries above remain brief, brevity certainly in no way indicates importance and size of these stumbling blocks toward reaching the cross-educated organizational goal. Overcoming the three categories of challenges requires work and a certain dedication to the end goal. Let's break down ways your institution can overcome these restraints while introducing a cross-training program.

Conjuring time and resources

Your organization will absolutely have to endorse allocating a certain amount of time and resources for a cross-education program to be successful. The more creative your pitch can be in terms of leveraging resources, the better chance you have of your leadership fully endorsing the program. And that endorsement is key to your success.

Work closely with your Human Resources department, garnering their support early in the process. They likely have access to expertise and resources you do not and may help absorb some of the workload in establishing your program.

Consider migrating as many tasks as possible to an online or e-training platform, especially if your organization already uses such software. This greatly assists in repetitive trainings, rather than eating away at staff trainer time, and allows greater flexibility for your employees to learn on their own schedule.

Whenever possible, integrate trainings in palatable pieces to already existing meetings, briefings, and educational sessions. The more your organization takes advantage of already scheduled time on the workforce calendar, the greater reach your program has without impacting productivity. Don't underestimate what you can accomplish, even in just 10–15 minutes!

Ensure the parties responsible for undertaking the program setup are fully supported by your organization. Breaking down a large, cumbersome task into small, reasonable duties when spread out across the masses makes any undertaking possible. And it works, but only if the organization *truly* divides and conquers the planning appropriately with enough reduction of workload so the responsible individuals can prioritize establishing the program.

Because maintaining an established cross-education program can be half the metaphorical battle, ensure your organization plans past the initial setup. Plan ahead for recurring training that can build off the initial training on a regular basis throughout the duration of employment. When onboarding employees, take the time to provide adequate shadowing and provide the basis for continued cross-training. If the base is built appropriately, maintenance isn't nearly as difficult. Maintenance is quintessential to ensuring continued cross-education is effective.

Boosting employee morale

Although having shareholders and upper management support your cross-training endeavor significantly affects your success, your organization absolutely cannot move forward without ringing endorsement from your employees. Poor communication and lack of employee input and engagement will be disastrous. This entire establishment process must have a rewarding and positive connotation for your workforce.[5]

Frame the topic well when first introducing it to staff, so they understand the true goal of your organization is to be a collaborative success and not to do away entirely with subject-matter experts or devalue employees as easily dispensable.

Make your workforce an active participant in this process. Empower your employees to choose topics, champion training sessions, coordinate internal shadowing sessions based on interest, and have them set their own expectations of one another.

Ensure anyone perceived as "leadership" in your organization is also actively participating. Your management may believe that stepping back is essential to employees owning the process, yet often it instead conveys that leadership believes they are above the cross-training process and don't require the same experience.

As you build the program, add mechanisms for ongoing feedback regarding the program, as well as regularly scheduled updates and support for maintenance. Assure employees openly that their contributions to setting up these features and using them is strongly encouraged by your organization.

Overcoming the loss of specialized knowledge

Finding a middle ground for your organization between broad-spectrum knowledge and specialized expertise is key to wrangling this particular challenge. Frequently, the hardest part of this challenge surrounds shifting the culture of your organization to accept a new approach. Much of that middle ground depends on the particular duties of each role, which is why trial and error is ideal, and it may require several attempts before you find the right balance for your organization. You may even find certain steps taken to assist in determining your middle ground will further assure your workforce, leadership, and even you that continued cross-education has far-reaching benefits.[6] You might:

- ▶ attempt testing out a formal coverage plan by teams/departments whereby employees coordinate their coverage amongst themselves,
- ▶ host a formal job rotation on a specific component of a project, and/or
- ▶ offer incentives across your organization for employees to obtain certifications across different topic and expertise areas.

Conclusion

Again, these ideas for overcoming the challenges to effective cross-training aren't intended to be exhaustive by any means, but they are intended to help firmly position you for success. As you refocus your efforts from the litany of literature on "what" and "why" to cross-train, you'll ask the better questions that promote positive progress for your organization—"when" and "how" to implement cross-training. Ⓖ

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