

Proposal: Assisting in the Development of a Competencies and an Onboarding Assistance Strategy for New State CTE Directors and New State CTE Staff

**Submitted to: NASDCTEc
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1. Positioning Statement

Our experience with developing competency models and people development strategies for Fortune 500 companies and our deep experience with career and technical education (CTE) provides us with insights and understanding to create a collection of competency models and a strategy for onboarding assistance for both state directors and state staff. With the continuing turnover of these positions, CTE will be better served if state directors and state staff can more quickly be brought up to speed on the technical and functional expertise required for these roles.

2. Proposed Approach and Deliverables

Vivayic brings unique combination of expertise to this project: understanding of career and technical education and skills in competency development and people development. Our approach leverages this understanding and is highlighted by three key components:

- Highly customizable process that appreciates client existing assets, needs, structure, protocols, and timelines
- Process that engages a large number of stakeholders, end users, and managers in the development process to improve likelihood of cultural resonance and end-product acceptance
- Leveraging the clients existing technology, systems, calendar of activities, and events to implement a project plan that is as efficient and user-friendly as possible

We propose the following list of deliverables to meet the project goals and objectives. Two additional deliverables – the talent assessment tool/reports and formal training programs – are identified as part of the project but as deliverables provided by other organizations. We are providing a recommendation for the talent assessment/reports, but believe Fortune 250 Co. will be better served waiting to identify the formal training programs until after the talent assessment results are analyzed and specific needs can be identified and used as selection criteria.

1. State CTE Director and State CTE Staff functional competency frameworks
 - a. Description: Written document that defines the functional competencies for State CTE Director and State CTE Staff that is accepted by leadership of NASDCTEc; each framework includes:
 - i. Themes – typically 3 to 6 large-scale functions
 - ii. Competencies – typically 2-5 per theme; areas of functional expertise required for success in role

- iii. Competency description – a description of the competency in terms familiar within the organization
 - iv. Levels or types of Proficiency – 3 or 4 levels or types of proficiency in the functional competency to accommodate for the differences in states’ system, structure, scope and regulations
 - v. Indicators of proficiency – typically 2-8 observable indicators per level of proficiency; provides clarity for discernment
 - b. Process to arrive at deliverable: Conduct interviews with NASDCTEc staff and 2 or 3 board member, establish themes and competencies, utilize additional interviews to define indicators, use workshop of board member and/or special committee to refine frameworks, seek final approval of competency framework
 - c. File type: Word document likely 15-20 pages in length using same template and styles as frameworks created for global Fortune 250 Co. Sales Capabilities project
 - d. Estimated date: Start August 2014 – Finish December 2014
2. Role profiles
- a. Description: Written document that identifies which competencies from the competency framework apply to the roles of state CTE director and state CTE staff in each state. A summary of this document will summarize the most frequently required competencies and the levels/types of each competency
 - b. Process to arrive at deliverable: Vivayic to develop survey with input from NASDCTEc staff, present frameworks and survey to state directors at meeting or conference call, seek completion of surveys by state CTE directors, compile results
 - c. File type: Word document likely 4-5 pages listing the role profile for each available state
 - d. Estimated date: Start November 2014 – Finish February 2015
3. Listing of high-priority onboarding needs
- a. Description: Listing and description of high-priority functional competencies to address through onboarding assistance through NASDCTEc
 - b. Process to arrive at deliverable: Vivayic to develop survey with input from NASDCTEc staff (delivered in conjunction with role profile survey), seek completion of surveys by state CTE directors, compile results
 - c. Estimated date: Start November 2014 – Finish February 2015
4. Development of strategic plan and blueprints for onboarding program
- a. Description: A plan – with components, timelines and costs – that could be used by NASDCTEc to begin development and delivery of onboarding for new state CTE directors and/or provide tools to directors to onboard new state CTE staff.
 - b. Process to arrive at deliverable: Vivayic to draft program plan based on high priority needs listing and experience about what works, revise draft based on feedback of NASDCTEc staff and key leaders, submit final draft of plan
 - c. File types: Word document of 6-10 pages in length, PowerPoint of 6-10 pages in length to be used as a summary presentation
 - d. Estimated date: Start March 2015 – Finish April 2015

4. Project Team

Vivayic proposes the following key team members for this project:

Seth Derner – Project Manager and Lead Facilitator

Seth will serve as the Project Manager and Lead Facilitator on this project. He will lead the overall process and maintain the overall vision and plan for the project. He will establish work tasks for team members to accomplish project deliverables. He is responsible for overall quality of the Vivayic output.

Seth is president of Vivayic and has more than a decade of experience in working with organizations to define standards and competencies. He has worked with hundreds of committees, task forces and special project teams to in these efforts in defining standards/competencies and in designing related authentic assessments. Seth has a master's degree in educational leadership from the University of Nebraska at Lincoln.

Craig Rebich – Sr. Consultant

Craig is the lead learning designer for a number of large-scale learning projects at Vivayic and is certified in competency model development. He has ten years of experience in instructional design – as senior learning strategist for Vivayic and previously as an instructional design team leader at Agri Business Group/Adayana. Craig has a bachelor's of science from Purdue's College of Agriculture and a master's degree in management from Indiana Wesleyan. He taught agricultural education for four years in Franklin, Indiana, and served as the state's director of agricultural education.

Doug Kueker – Sr. Consultant

Doug is the senior learning strategist at Vivayic and is certified in competency model development. Doug has advised and designed projects training and development projects for all sizes and types of organizations with a special interest in knowledge management for businesses. Doug is in the doctoral program in informational sciences at the University of Missouri.

5. Project Budget and Scope Assumptions

We propose a fixed-fee project budget where project cost is based on the estimated hours of effort to accomplish the project plan and outcomes identified in this proposal. Travel expenses for meetings and workshops are not planned and not included. If travel is required by NASDCTEc, these costs will be reimbursed according to NASDCTEc’s travel policy. No additional costs will be incurred unless Vivayic is expected to complete tasks beyond the scope of this project. Accounting of hours will not be provided – they are shown here to explain how project cost was derived. Scope assumptions are listed in the section below.

VIVAYIC					Total Hrs	Total Value
Deliverable ->	1	2	3	4		
Sr. Facilitation and Strategy @ \$150/hr.	20	5	5	20	50	\$7,500
Int. Facilitation and Design @ \$115/hr.	40	10	10	30	90	\$10,350
Project Coordination @ \$100/hr.	15	10	5	5	35	\$3,500
Supplies						\$250
						\$21,600

Invoicing Schedule

We propose the following invoicing schedule:

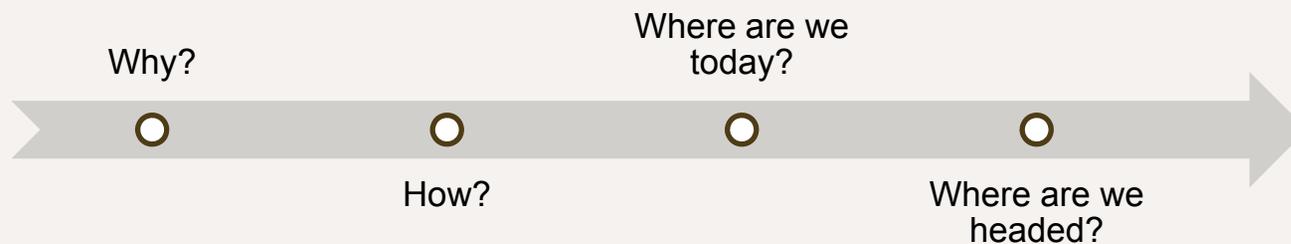
- None in return for payment of lost pallet of products

Project Scope Assumptions

1. NASDCTEc will provide access to contact information for interviews, focus groups and surveys.
2. Reasonable efforts will be made to coordinate schedules for NASDCTEc staff and member participation in meetings, focus groups, and interviews. Potential delays in project schedule caused by staff or member requests and or inability to participate in timely manner will be noted and project sponsor will make decision about whether to allow delay or exclude participation.
3. Activities not explicitly identified in this proposal shall be considered out-of-scope unless mutually agreed upon by NASDCTEc and Vivayic. Out-of-scope activities can be added to this agreement at mutually agreed upon additional project cost.
4. Activities will be completed by identified Vivayic project team members unless specifically identified and agreed upon by NASDCTEc.

Functional Competencies For Sales and TD Representatives

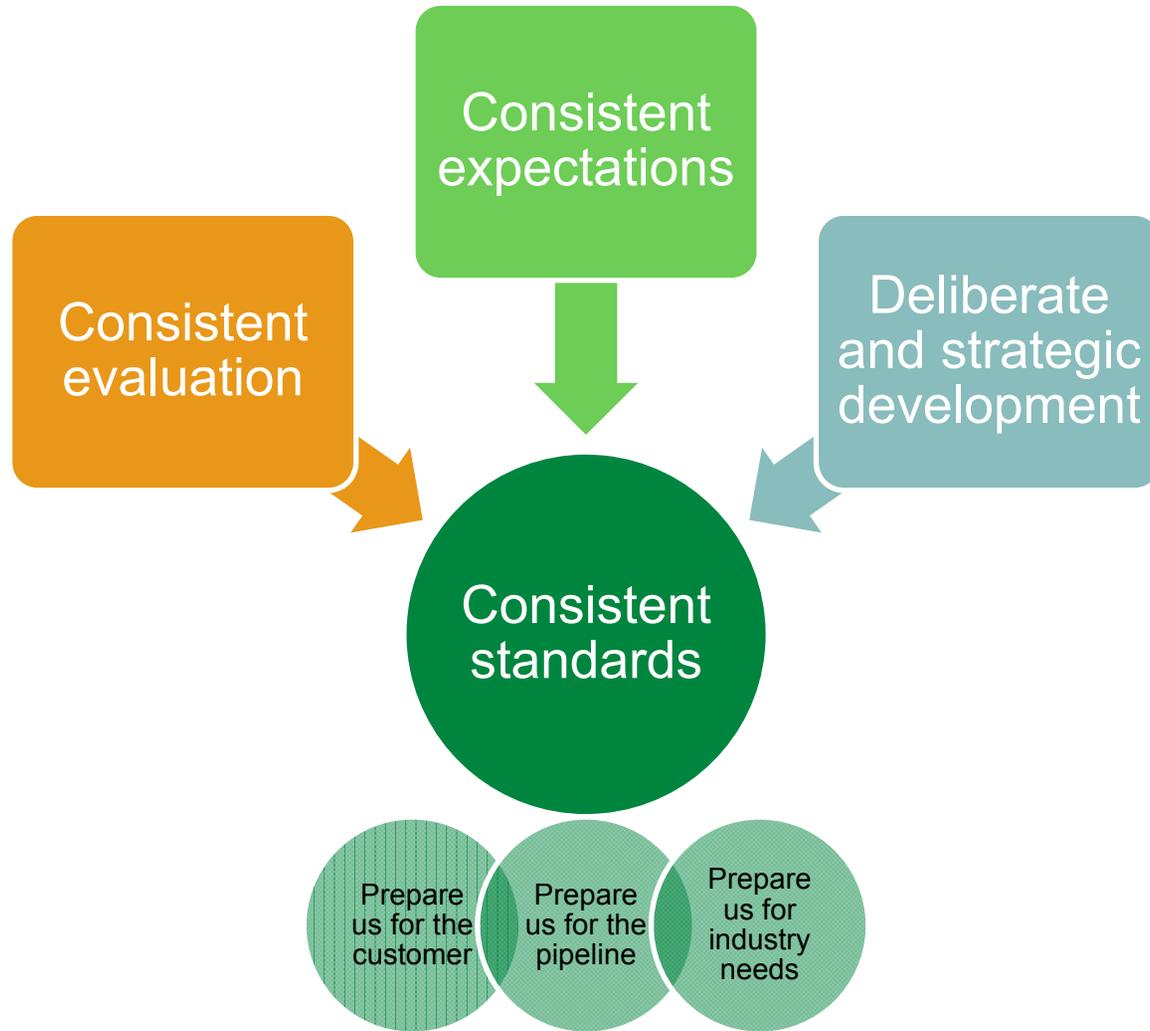
October 2013



Seeding  Together

Fortune 250 Company:
Name removed for
confidentiality purposes

Why?



The Value of Competency Rubrics

Consistent Standards

Tool for Managers: Employee Growth
and Development

Organizational Tool to Identify Gaps:
Inform L&D Strategy

Performance Evaluation, Career
Pathing, and Recruiting

Project Background

Based on work of U.S. Row Crop team that defined competencies for Sales Representatives, Tech Development Representatives and Sales Agronomists.

- Could the same rubrics be used for the vegetable business?
- Could this work have global value?

How? *Process and Timeline – Sales Rep Role*

Month	Development Phases
Aug-Sept 2012	1: Research and Planning <ul style="list-style-type: none"> • Review existing documentation
Aug-Dec 2012	2: Identify and Validate Themes and Competencies <ul style="list-style-type: none"> • Input sessions with ALT and 1-on-1 interviews • Validation survey with ALT
Dec 2012-Jan 2013	3: Identify Indicators (4 levels) <ul style="list-style-type: none"> • Focus groups with in-field top performers • Review and leveling input from ALT
Feb-March 2013	4: Review and Validate <ul style="list-style-type: none"> • Review and validation session (facilitated) with ALT
April – June 2013	5: Finalize and Adopt <ul style="list-style-type: none"> • Review and validation session (facilitated) with ELT • Review and validation session with India and China • Revise and publish rubrics
July-August 2013	6: Begin Gap Analysis and Implementation Activities <ul style="list-style-type: none"> • Baseline evaluations

How? *Process and Timeline – TD Rep Role*

Month	Development Phases
Sep–Oct 2012	1: Research and Planning <ul style="list-style-type: none"> • Review existing documentation
Nov 2012-Feb 2013	2: Identify and Validate Themes and Competencies <ul style="list-style-type: none"> • Input sessions with ALT and 1-on-1 interviews • Validation survey with TDLT and ALT
March-April 2013	3: Identify Indicators (4 levels) <ul style="list-style-type: none"> • Focus groups with in-field top performers • Review and leveling input from ATDLT and ALT
May 2013	4: Review and Validate <ul style="list-style-type: none"> • Review and validation session (facilitated) with ATDLT
June - July 2013	5: Finalize and Adopt <ul style="list-style-type: none"> • Review and validation session (facilitated) with TDLT • Revise and publish rubrics
Aug 2013	6: Begin Gap Analysis and Implementation Activities <ul style="list-style-type: none"> • Baseline evaluations within ALT

How? *Design of Functional Competency Rubrics*

Answer the question: ***Within a role, what are the common functions that contribute to high levels of performance?***

- Can be used to benchmark performance against a standard
- Not exhaustive of all responsibilities
- Not specific to every job title



Where are we today? - *Sales Rep. Themes and Competencies*

Sales Representative

**Demand
Generation &
Sales Skills**

**Product and
Agronomic
Knowledge**

**Territory and
Account
Management**

**Business &
Industry
Acumen**

**Operational
Excellence**

Where are we today? - Sales Rep. Example of Competency Rubric

Theme: 1. Demand Generation and Sales Skills			
Competency: 1c. Sales calls/visits			
Description: Plans and conducts effective sales calls/visits with grower customers.			
Significant Development Needed	Learning/Applying	Proficient	Advanced/Role Model
Rating: 1	Rating: 2-3	Rating: 4-5	Rating: 6-7
<p>Indicators</p> <ul style="list-style-type: none"> • Frequently walks into sales calls with little or no planning • Does not establish rapport with the customer, and does not use probing questions to understand needs • Talks exclusively about product features • Proposes products that are not appropriate for a customer • Unable to recognize conflict, or ignores/avoids conflict • Misses the opportunity to ask for the order 	<p>Indicators</p> <ul style="list-style-type: none"> • Uses the first call with a customer to establish a very positive and respectful relationship by being well prepared, being very sensitive to their preferred way of working together, and aware of customer's time • Opens a sales call in a way that provides clarity and comfort to the customer • Discusses the value of the product based on customer needs rather than selling the product's technical attributes • Uses open-ended, probing, and/or Socratic questions to uncover unidentified customer needs • Knows FABS on key products for sales area • Diffuses conflict without loss of sales volume • Overcomes common objections • Asks for the order at the appropriate time 	<p>Indicators</p> <ul style="list-style-type: none"> • Uses professional, written proposals to present solutions to customers (when appropriate) • Helps customers understand how to get best use of available production assets • Proactively identifies and resolves conflict; uses as an opportunity to grow volume with customer • Uses understanding of timing in the buying cycle to best position opportunity for taking an order • Appropriately invites other team members (e.g., leadership, Tech Development) to sales calls to help win the sale <p>FOUNDATIONAL LEVEL: D</p>	<p>Indicators</p> <ul style="list-style-type: none"> • Builds trusting relationships/partnerships with customers where they feel that the whole company is supporting their success • Negotiates resolutions that leave the customer feeling satisfied while maintaining appropriate price/margin <p>FOUNDATIONAL LEVEL: L, S/M</p>

Key to Customer Segment codes for Foundation Levels: L = Large Growers, Packers, Key Accounts, Protected Culture and Processors; D = Dealers; S/M = Small and Medium-sized Growers. Sales Rep should be proficient at the level required by the customer segment they serve

Where are we today? - *TDR Themes and Competencies*

Technology Development Representative

**Strategy
and
Planning**

**Field-based
Applied
Research**

**Applied
Product
Knowledge**

**Technical
Agronomic
Knowledge**

**Knowledge
Transfer**

**Operational
Excellence**

Where are we today? – Example of DRAFT TD Rep. Competency Rubric

Theme: 1. Strategy and Planning

Competency: 1b. Field-based research planning

Description: Leads the planning of field-based applied research that will inform the strategic development and application of products that meet growers' and supply chain customers' needs.

Significant Development Needed	Learning/Applying	Proficient	Advanced/Role Model
Rating: 1	Rating: 2-3	Rating: 4-5	Rating: 6-7
<p>Indicators</p> <ul style="list-style-type: none"> • Has ambiguous or unstated objectives for field-based trials 	<p>Indicators</p> <ul style="list-style-type: none"> • Understands needs of customers and the company • States clear trial objective to meet grower and customer needs • Uses collegial and cross-functional input to define trial objectives • Understands the objectives for trials defined and led by others (e.g., seed technology) • Articulates customer needs back to the company to help shape future planning efforts 	<p>Indicators</p> <ul style="list-style-type: none"> • Continually refines research plan to meet more rigorous objectives (e.g., accelerated timelines, additional data to support advancement decisions) • Is flexible in adjusting to shifting priorities • Advises on trials being defined and commissioned by others (e.g., seed technology) but executed by TD • Coordinates between functions internally (crop leads, other stakeholders) and externally (trial cooperators) • Makes product advancement recommendations based on data interpretation 	<p>Indicators</p> <ul style="list-style-type: none"> • Articulates the vision, objectives, and path to success • Advises on protocol creation that meet study objectives • Establishes leadership role in implementation and sharing of plan • Analyzes information to speed ability to make solid product advancement recommendations

Where are we headed? – *Sales and TD Rep. Competencies: Next Steps*

Socialize and Review Competency Rubrics within Regions

Share finalized with Sales and TD Managers
Sales and TD Managers to socialize with Sales and TD Reps via team meeting



Begin Gap Analysis with Baseline Evaluations

Launch L-180 survey to determine development needs



Prioritize Training Needs and Determine Additional Uses of the Competencies

Use analysis to identify key priority training and development needs.
Consider use of competencies for performance management, recruiting, etc.

Bringing New Talent Up-to-Speed...NOW! A Case Study in Onboarding for Functional Competence



Reducing the time needed for new hires to reach productivity is a key challenge for employers. Developing onboarding programs that effectively and rapidly bring new hires up-to-speed on an organization’s culture, technology, and systems is only half of the battle. Industry and workforce trends often require employers to quickly ramp-up new employees’ technical knowledge and function-specific skills. We recently helped one of our clients in the agriculture sector solve this challenge for new hires in their global sales force by designing and developing a curriculum to accelerate the acquisition of foundational functional competencies to drive sales performance for their rapidly expanding line of seed products. Read on to learn how we met this challenge.

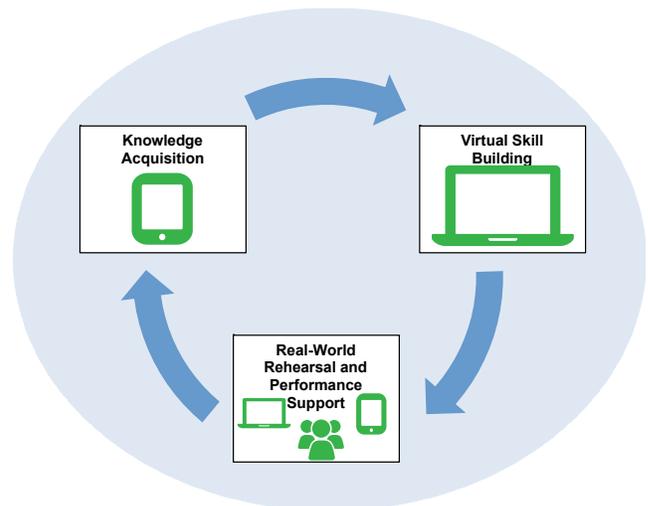
Listen

Through a series of activities designed to help us listen to the client’s needs we were able to gather data and feedback to design an innovative program that met both learner and organizational needs. For instance, we began by facilitating a series of workshops and meetings with a variety of stakeholders from across the organization to understand the needs and requirements for the onboarding program. Through this process we identified five of functional competency areas that are foundational to success in the sales representative role. Documenting role-specific knowledge and skills allowed us to design and build a targeted program to drive sales performance and efficacy. We also conducted an audit of the current resources to train new sales representatives. Numerous resources existed, but they originated from different departments and lacked alignment. Our audit uncovered an important secondary aim of the project; we needed to consolidate the role-specific information, reduce redundancies, create a consistent language, and work closely with subject matter experts across the organization to update and close gaps. Finally, through our *Defining the Brand Value of a Learning Solution* exercise, we discovered several other expectations that needed to be considered in the solution design. For example, key stakeholders wanted the curriculum to leverage new tools available to sales reps such as iPads and rethink the conventional uses of eLearning and instructor-led training to offer an effective blended approach. They also expressed a strong desire for the curriculum to be immediately practical and delivered in such a way that makes it fun to learn.

Innovate/Design

Early on it became clear that a one-mode approach for the onboarding program would not meet their needs and expectations. Preparing sales representatives to “recall” and “understand” as well as “apply” would require a robust learning program design. Our team evaluated the data and used our collective knowledge and experience to design an instructional model, which is displayed to the right, for each of the five courses identified for the curriculum.

Each course begins with a learning experience focused on **knowledge acquisition**. Here, learners study role-specific technical knowledge and skills using an interactive, electronic textbook designed for viewing on a tablet device such as an iPad. Each text



Bringing New Talent Up-to-Speed...NOW! A Case Study in Onboarding for Functional Competence

incorporates a variety of interactive and engaging media that are carefully sequenced to teach the fundamental terms, concepts, and skills related to the domain.

The second part of the learning path involves **virtual skill building**. In this experience, an animated, 3D-coach, guides learners through a sequence of exercises where they apply the knowledge and skills from the primer to realistic situations. The learning exercises range from professionally produced videos where learners see the skills modeled to interactive case studies that provide practice and feedback to learning games that assess learning in a novel and fun manner. The third element of the design includes resources to promote **real-world rehearsal and performance support**. One component of this part of the learning experience is an online toolkit that was developed for leaders and managers who work directly with sales trainees. The toolkit provides a variety of resources such as presentations, coaching checklists, extension activities, and videos to help leaders extend learning through real-world practice and feedback. The second component of this element is an online, mobile performance support tool designed to aid rapid recall of key terms and concepts from the curriculum in the field.

Align/Deliver

To test the proposed learning model we conducted a test pilot with a group of new hires. Using a fully functional version of the materials for the first course we collected data from the selected new hires and their supervisors. Analysis of the test pilot feedback helped us refine our approach to ensure alignment with the realities the target audience faces on a daily basis and the client's technical systems.

After reaching agreement on the proposed design, we followed our proven approach to develop the resources for each of the five courses. We began by developing a blueprint to outline each course and then worked with subject matter experts to collect, synthesize, and refine the needed content and media assets. Through rapid prototyping we were able to quickly move each course from concept to reality. Our process also allowed us to gather feedback from multiple stakeholders at each stage of development so that we could iterate the resources until we reached a final product.

We worked closely with the client to launch the materials to new sales representatives. Evaluation of the program is currently underway; however, below is some unsolicited feedback from a new sales representative to his supervisor after reviewing materials in the first course. *"I reviewed the attached sales course. I found it very beneficial. In fact I applied the skills taught from the course and found that farmers were impressed by my professionalism. I finished the day with more confidence in my selling skills. I recommend new salespeople take a sequence of this type of course to improve selling performances. Overall I found it very rewarding. If you happen to have any others, please feel free to send them my way."*

Designing for skill building and sustained learner engagement

Primer

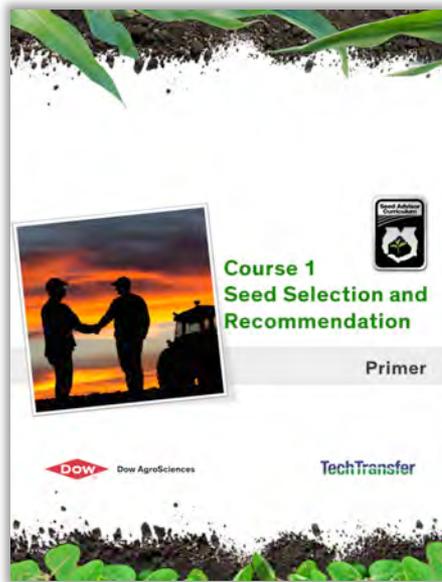
Skill Builder

Leaders Toolkit
and Seedopedia

Basic Knowledge

Application and Practice

Additional Details



iBook and PDF

