

The Problem



Business Problem Statements:



Employees training for a position (or new to a position) have trouble understanding what they need to know and what tasks they need to know how to do.



Jobsite Managers lack any way to evaluate and track the demonstration of job tasks for each position.



Some tasks are critical to the position and must be understood as soon as possible for safety reasons. Other tasks are still necessary for that position, but are not as time-sensitive or may not be available to learn/demonstrate based on operational needs.

Needs Analysis:



A **standard set of knowledge and skills** need to be developed for each position on location.



Employees need a **checklist of detailed job tasks** so they understand what they need to know and do.



Mentors need a **checklist of job responsibilities** for new employees to a position so they can have a guide of knowledge and tasks to teach new employees and verify their competency against.



Jobsite Managers need something they can use to check off as they verify that employees have been taught and can **demonstrate the CORRECT knowledge and skills** required of the position they are in.



Defining Overall Objectives:

- All employees of a given position possess the same baseline set of knowledge and skills that are aligned to their job duties.
- Verify employees know the right way to accomplish these knowledge and skills.
- Track progress, completion, and outstanding training through automated reports.

Potential Obstacles:

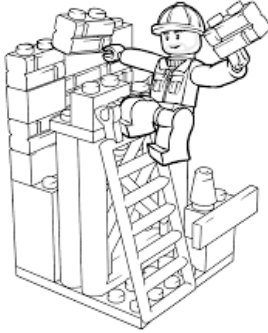
- **Tribal knowledge** – Most rig knowledge passed down by word of mouth. Employees assume they know how to do something the correct way because it is how they have always done it.
- **Different equipment** - Employees work on different styles/brands of equipment requiring different operation and maintenance.
- **Technology** – Limited bandwidth on some locations. Limits to where mobile technology (tablets/phones) can be used.
- **Harsh work environment** - Messy, chemicals (oil based mud), extreme heat/cold/rain.
- **High mobility** – Employees move to different locations frequently, so jobsite managers change. Training records need to follow employee.



Defining the required knowledge and skill tasks

Phase I – Collection of information

- Identify single position to begin with. Work on multiple after process is established.
- Identify groups of people to collect information from:
 - Current employees in position.
 - Former employees that worked the position
 - Jobsite managers overseeing the position
 - Support Services (HSE, Technical Services, HR, etc.). They may identify frequently missed details in tasks that have not been identified, or tasks critical to other departments. These tasks might have been overlooked by others, but may need to be added based on how critical they are.
- Collect information from employees working in variety of equipment and regions.
- Cast a wide net – start with collection of as much information as possible.

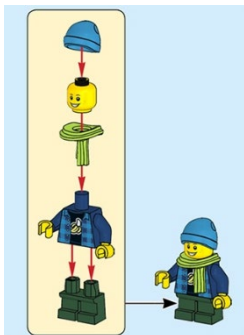


Phase II – Narrowing/selection/defining of Tasks

- Group and combine tasks where possible.
- Create a list for review.
- Meet with stakeholders to review. Stakeholders should have high operational experience and have authority to make decisions.
- Narrow down to final list.



Phase III – Identify right way to complete each task



- Have Operations list out how to complete each task.
- Refer to OEM manuals when equipment is involved. (but evaluate if OEM is correct!)
- Conduct a review of the instructions by multiple departments (HSE, Technical Services, HR, maybe even Legal?)



Defining the process

Now that you have determined WHAT the employees need to know and do, you need to define HOW this information will be collected and tracked. Build out a flowchart that begins with the employees receiving training materials, and ends with a method of verifying completion. Note that Operations should own this – **if Operations does not have buy-in, the program will not be successful!**

Below are some sample questions your flowchart should be able to answer, along with some examples of answers to these questions in parentheses:

- Determine when employees receive physical materials. (When provided by Jobsite Manager)
- How does employee learn how to complete tasks (Mentor with assistance from Training materials).
- Who verifies training has been completed? (Jobsite Manager)
- How is training recorded (by Jobsite Manager into electronic system).
- How are different task priorities handled? (Critical tasks have different timeframe requirement for completion than regular tasks).
- How is there oversight of completion? (Exception reports)
- Who “owns” the completion of training? (Operations should be responsible for the completion of training. When managers are provided with exception reports of their employees outstanding training, managers should assure completion.)



Tracking methods used

Some work environments are not a good place for computers, laptops, or even cell phones. But this information must get recorded and eventually entered into an electronic system, so what does this process look like? Two options are available:

- 1) Use ruggedized electronics that can withstand elements and harsh working conditions or,
- 2) Use low-tech manual solutions where training occurs and transfer information to electronic format.

Below is an example of what Option 2 might look like:

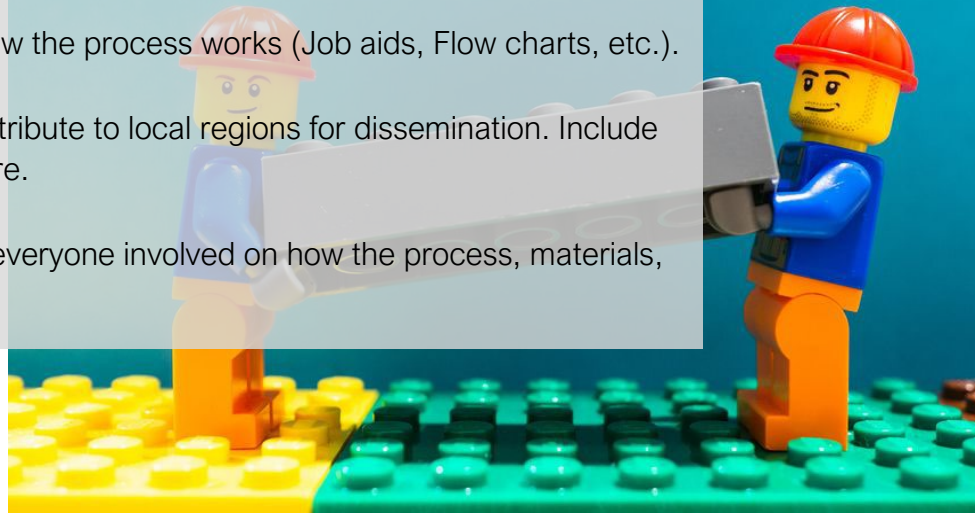
- Frontline training is provided to field employees in small booklet that fits into employee’s pockets with grease pencil.
- Mentors train and manually record the initial training into booklets.
- Jobsite Managers verify training and then periodically transfers completion records into the electronic software system.
- Once records are in the system, they can be tracked, reported, etc.



Roll-out / Implementation

The roll-out of a program is crucial to its success. It is the “First Impression” employees will have with the new program, and may require as much or more process planning as the new initiative. Below are a few of the key steps to planning the roll-out:

- Build materials to teach people how the process works (Job aids, Flow charts, etc.).
- Put materials into packets and distribute to local regions for dissemination. Include information on how to reorder more.
- Hold rollout meetings to educate everyone involved on how the process, materials, and technology work.



Follow-up process

A program will not succeed without follow-up. Below are a few of the components that should be used:

- Exception reports used to identify outstanding training not completed.
- Surveys sent out to get feedback on process.
- Jobsite Managers review process and purpose during additional training
- Superintendents (area managers) collect feedback from Jobsite Managers on process and pain points related to OJT process.
- Superintendents, HSE, and other personnel that travel to jobsites ask employees questions about their training to spot-check competency.
- Changes to OJT items collected and revisions to training material are periodically released as needed.



Program Results

Once the training has been developed and rolled out to all field-based positions, it is time to track and measure the outcome.

- Use automated exception reports whenever possible to monitor completion progress.
- Employees should be expected to complete new training as they move up in position. The assignment of new training should be automated.
- Separate timelines for critical tasks and regular tasks can be built into OJT. Any training not completed within timelines should be identified along with location and jobsite managers.

Survey Results

Once the program has been rolled-out and established it is important to collect feedback from those involved in it. Below are actual comments from anonymous surveys sent out to employees on our OJT program – the feedback was overwhelmingly positive:

- “
- It fills in the gaps with the question regarding ‘what is my job?’
 - The OJT program gives you hands on experience and helps you learn faster and efficiently.
 - For guys that have not been in the position it makes sure they know what they need before promoting them.
 - Gives employees the expectations of the job so they can be more focused on doing the right thing.
 - It standardizes certain important tasks for employees at each level to be able to complete.
 - I like that it creates a path from Floors to Driller.
 - Helpful. Helps to test my knowledge and advance my learning on issues that might help save my life or others.
 - It gives you the expected tasks of each position and allows you to see where you can improve.
 - I think it’s a good idea to make sure everyone knows their responsibilities and they have the knowledge for their position.
 - It offers direct training to employees and also gives proper answer in booklet to verify training given is correct.
 - Making sure the employee is ready for an advancement and knows the roles when they get it. Rather than just getting thrown into it and potentially failing at task or getting themselves or someone hurt.
 - Forces some experienced hand to take the time to teach rather than just expecting everyone to know.
 - The people are willing to train you in all positions.
 - It provides knowledge and expectations of one's job duties.
 - I like the structure that it gives the position. The program gives a solid base line to work off of.
 - I have the book for motors, I am a floorhand and I have it at home on days off. It is helpful to be more understanding the next position so when I am ready I can go ahead and get my motors OJT done.
- ”

Additional survey question results:

These questions were used to verify several additional things – all with very positive results:

- Our employees felt the program was beneficial
- Our employees understood how the process was supposed to work
- Our employees saw value in the manual tracking component of the program

How beneficial is the OJT training to our people?

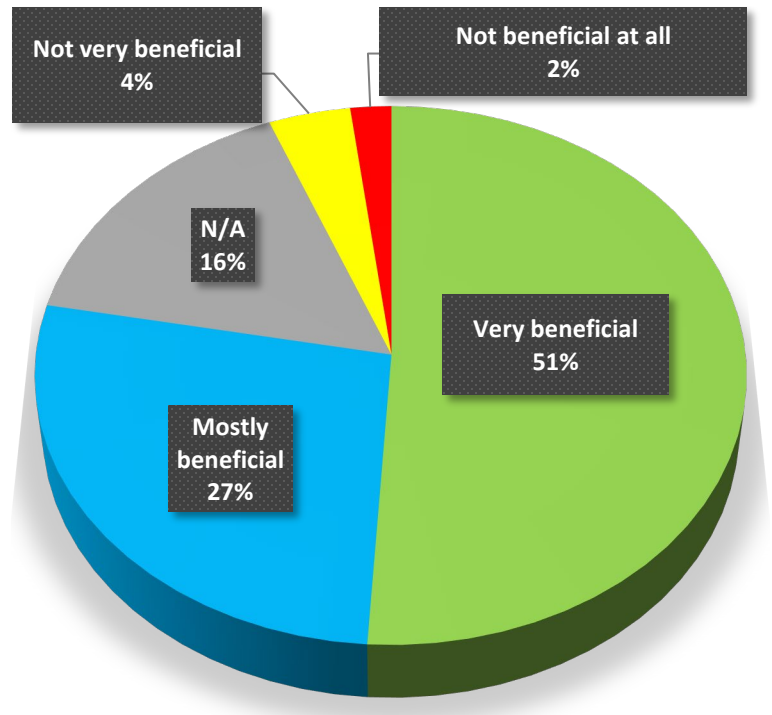
- 51% = Very beneficial
- 27% = Mostly beneficial
- 16% = N/A
- 4% = Not very beneficial
- 2% = Not beneficial at all

How well do you understand the OJT process?

- 58% = I understand it very well
- 27% = I understand it fairly well
- 10% = N/A
- 1% = Not much
- 2% = Not well at all

How useful are the OJT tally books?

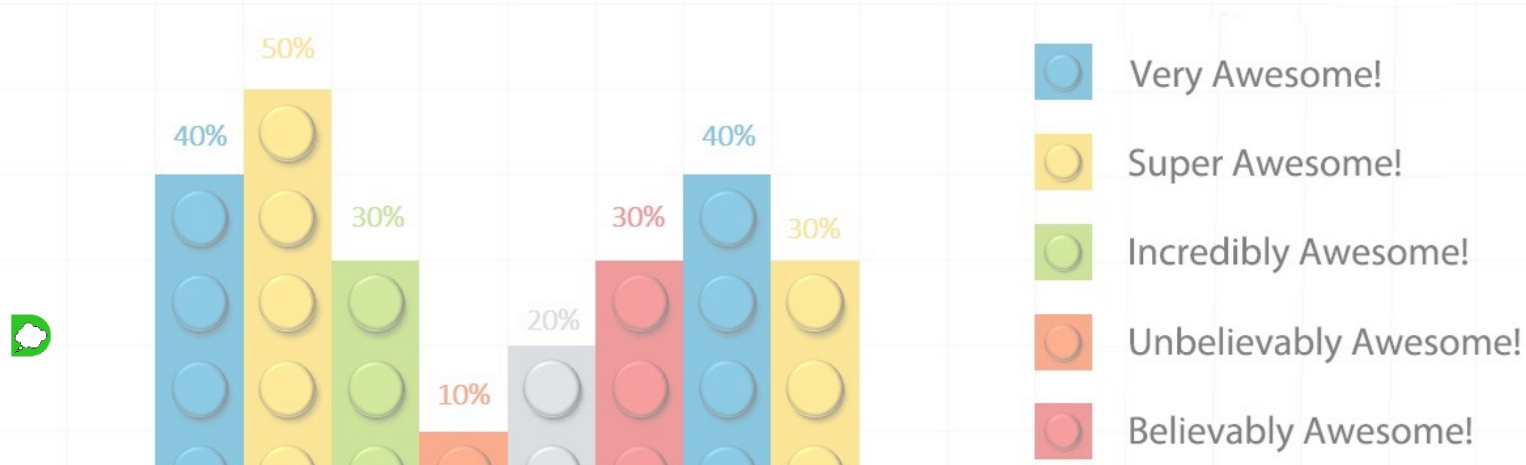
- 48% = Very useful
- 21% = Mostly useful
- 23% = N/A
- 5% = Not very useful
- 3% = Not useful at all



In summary, the program was a success. In addition to the positive survey feedback and participant testimonials, employee retention and job satisfaction increased, turnover and the learning curve to new positions was reduced.



OJT Satisfaction Survey



For more information on developing OJT programs, and other employee development, visit



www.developingthought.com

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