

CROSS-TRAINING

Best Practices



In most organizations, one of the most significant expenses is the organization's investment in its people. One such investment is cross-training. Cross-training involves giving employees the opportunity to learn new tasks or skills that would usually fall outside of their primary job duties. With cross-training, individuals (trainees) learn to be supports or back-ups for other individuals (trainers) when those individuals are on leave or are otherwise absent from the workplace for a defined time. Cross-training can also be another way to train future managers. It can also strengthen teams and give employees more opportunities to advance.

Cross-training can also be a strategic tool for an organization. One common use for cross-training is to assist the organization for succession planning. It allows the organization to build its resilience when individuals plan to exit from the workplace. In this way, cross-training helps organizations to prepare for change.

Cross-training may not be advisable for some tasks or skills, such as those that are highly specialized. For some tasks or skills, the organization may also not want less skilled employees trying to handle very complex tasks or issues. In such instances, the organization may want to supplement cross-training with additional professional development opportunities for the trainee(s). Cross-training requires planning to be implemented effectively.

Value of Cross-Training

For Employees

- Expand an employee's knowledge of different roles
- Support an employee in working on new projects or stretch assignments
- Improve employee readiness for collaboration, teamwork, and other potential roles in the organization
- Help an employee to specialize in alignment with organizational goals and initiatives
- Reassure an employee that one or more other employees can provide support when the employee takes time away from the workplace

For Organizations

- Maintain stability amid anticipated and unanticipated change
- Improve organizational agility
- Boost employees' understanding of and engagement with the organization
- Ensure continuity when a key employee is absent or leaves
- Preserve institutional knowledge
- Support internal mobility (which can enhance morale and reduce hiring costs)
- Strengthen collaboration among teams and break down silos

Some Best Practices

- Map essential roles (jobs needing cross-trained staff) and their key tasks or processes.
- Determine if the existing task or process is up to date (and still necessary) before cross-training anyone.
- Pair each trainee with a trainer (employee experienced in the task or skill).
- Be thoughtful about how you approach employees and address possible concerns upfront:
 - Some people may see the addition of another task as punishment.
 - Staff who are cross-training others may fear they will soon be replaced.
 - Staff not chosen to cross-train may resent being left out.
- Select the right candidates to be trainees. Consider their personality, motivation, and ability to take on the added responsibility of the task or skill. Get input from a trainee candidate's supervisor and from human resources staff, if needed.
- Make sure employees know why they have been selected to participate as the trainers (the people currently performing the task or skill) and the trainees (the person learning the task or skill).
- Be clear about role expectations, such as when a newly trained employee would perform the task or skill.
- Include cross-training as part of goal-setting discussions with employees. Make sure the organization's managers are comfortable with talking about cross-training needs and opportunities with their teams.
- Create a job rotation or job shadowing experience, if appropriate, for interested employees (trainees).
- Set clear learning objectives and manageable timelines. Be careful not to overload trainers or trainees.
- Support the employees involved by recognizing the learning curve involved and giving the employees (both the trainee and trainer) time to complete the cross-training.
- Supplement cross-training with professional development, as appropriate for the task or skill.
- Give trainees opportunities to practice their new tasks or skills through stretch assignments.

