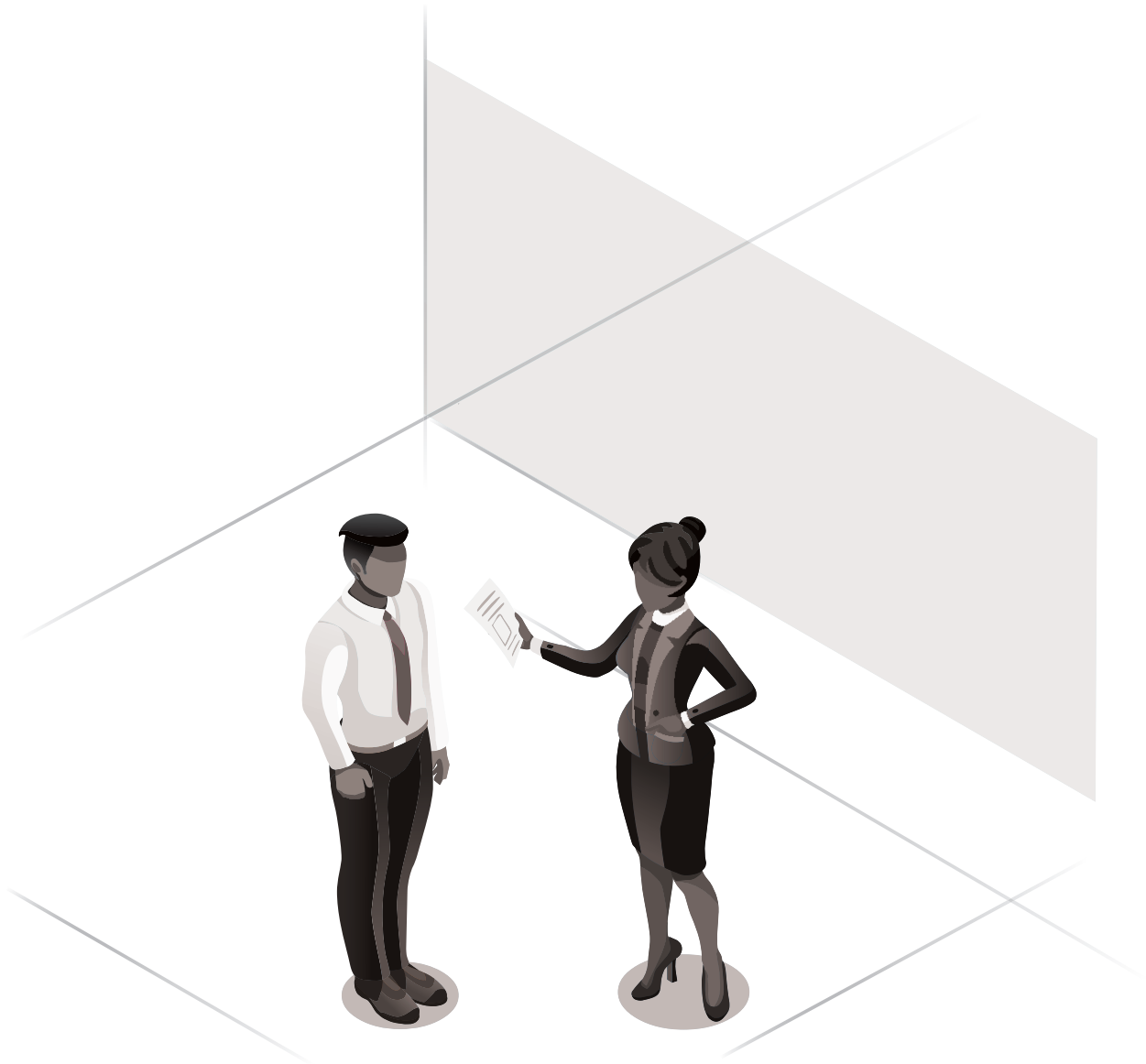# Training Best Practices:
ON-THE-JOB TRAINING

Introduction

Some tasks are easier to learn by working alongside someone. On-the-job training (OJT) teaches the skills, processes, and knowledge that learners need to perform their jobs in the environment where they will be working. Learners observe, ask questions, and finally perform the task, first with the guidance of an expert, and eventually, independently.

Learning Theories in Practice

OJT relates to Albert Bandura's social learning theory, one of three well-established theories on how people learn. Social learning or "observational learning," suggests that learners imitate the behaviors they observe in others. While most of his work is based on children's learning behaviors, his theories can be applied to adults, as well.

	Definition	Relationship to Work
Behavioral Learning Theory	Individuals learn behaviors by reinforcing the behavior through rewards or removal of a negative response.	Healthcare workers are evaluated on the number of patients they see and not the quality of the interaction.
Cognitive Learning Theory	When presented with information, individuals encode the information, so it can be recalled later.	Healthcare workers are required to recall information learned through training or formal education.
Social Learning Theory	Individuals learn new behaviors by observing others.	Workers will learn new tasks by watching someone perform the task and then trying to accomplish the same task.

What is On-the-Job Training?

OJT "happens whenever an experienced worker shows an inexperienced worker how to do a job," according to Gary R. Sisson in *Hands-on Training: A Simple and Effective Method for On-the-Job Training*. It is not something new. For centuries, people have developed skills by watching a master perform a skill and, through practice and guidance, they too mastered the skill.

Today, on-the-job training ranges from formally organized programs, such as apprenticeships, to informal on-the-job experiences where a peer shares a new skill or technique with others.

Example:

ON-THE-JOB TRAINING	LEARNING TRANSFER
An experienced nurse shows a less experienced nurse how to use an immunization card while she fills out the card herself. The lesser experienced nurse then fills out a card while being coached. After coaching and practice, the lesser experienced nurse is now able to perform the task on his own. While the task is being learned, work is being accomplished.	After watching a short instructional video on how to fill out an immunization card, the healthcare worker is asked to document how they will approach a patient with an immunization card. That document is shared with their supervisor and used for performance evaluation.

Learning transfer and OJT are similar in that they both take place outside the classroom. OJT differs from learning transfer in that there is no formal learning event to prepare the learner for performing the task. (Refer to the Best Practices on Learning Transfer for additional ideas that will help develop a learning transfer strategy.)

However, OJT programs can be designed as formalized and mandatory. When management assigns OJT, rather than offering it as an optional program, employees take training more seriously, and outcomes tend to be more effective.

What Are the Advantages and Disadvantages of OJT?

Incorporating aspects of the organization's culture into the learning is just one advantage OJT has over other learning methods. The trainer can share "the way things are done here" as they are explaining the tasks at hand. Culture is difficult to replicate in a classroom because often the instructor, while an expert in teaching, does not have the experience of performing the task in the work environment. OJT also requires less preparation for the trainer because they already know the content, and they can easily integrate regional or national norms into this learning experience.

OJT can be cost-effective when the learner is part of the workflow, but it can also be cost-ineffective because the higher performer is taken out of the workflow--reducing their productivity. There is also the added cost if the learner later needs to be retrained because the OJT was inadequate or inconsistent.

When evaluating the use of OJT, it's important to think about the current personnel. If the organization does not have the expertise already embedded in the workforce, it will be difficult to find trainers. Depending on the skill needed; web conference, video calls, or other forms of communication could be used to provide feedback and reinforcement.

In summary, these are advantages and disadvantages to using OJT as a primary method for improving worker performance.

👍 Advantages	**👎 Disadvantages**
Simple method of learning	Experts may not be trained as teachers or trainers
Inexpensive to develop and deploy	Lack of consistency in level of training
Provides understanding of the environment in which work is done	Slows down the productivity of others
Speed to performance	Difficult to identify the skills and individual with the expertise to train
Allow for immediate personal feedback and behavior correction in the moment	Safety can be an issue
New skills are practices as they continue to perform their jobs	Increases operational costs due to a decrease in productivity
Those doing the training tend to learn a lot from teaching others	

Possible solutions to mitigate some of the disadvantages for low-risk tasks include:

- Use web conferencing to connect trainers with workers that are in remote or at locations where there are not trainers who can conduct OJT

- Blend traditional learning with OJT

- Record the trainer and learner performing the tasks and compare videos

What are some OJT methods?

The term "on-the-job training"can cover a wide range of instructional methods, but they all have two things in common: 1) training is done while performing the actual task and 2) the learner is given immediate feedback and positive reinforcement.

Job Instruction Training: Job instruction training is the demonstration of a task or skill in the work environment by an experienced expert. This systematic process reduces the need for learning transfer because the learning is happening where the task is performed. The key to a successful job instruction program is consistency in documenting the task. This simple process involves the OJT trainer demonstrating the task while verbally explaining what they are doing. The learner then repeats the instruction back to the trainer, as the trainer performs the task. Finally, the learner performs the task while stating what they are doing. The number of times each phase is repeated depends on the complexity of the task and how fast the learner is able to grasp the concepts. The trainer may need to repeat the task several times before the learner can correctly explain the task and move on to the next phase.

	OJT Trainer	**Learner**
Phase 1 – First Time the Task is Done	🏃 Performs the task 💬 Explains what they are doing as they complete the task	👥 Observes the task being done ❓ Asks questions about the task
Phase 2 – Second Time the Task is Done	🏃 Performs the task as the learner explains what to do ❓ Asks the learner questions	💬 Explains how to do the task 👥 Observes the task being done
Phase 3 – Third Time the Task is Done	👥 Observes the learner doing the task ❓ Asks the learner questions	💬 Explains what they are doing as they complete the task 🏃 Performs the task as they explain what they are doing

Job Rotation: Job rotation is the movement of an individual through a series of different roles in an organization with the end goal of them returning to their original role with a set of new skills and abilities. Depending on the skills needed in a job and how similar the tasks are to what they are already doing, rotations can be a few days to months or even years. For example, in a clinic there may be a set of skills that all workers need, like interacting with patients. However, the person screening patients may need to ask specific questions and complete certain forms. It may take just a day of job instruction training for a clinician to understand the role and be competent in the tasks associated with it. In other roles,the tasks may be so complex that it would take months to be competent with the work.

Mentoring: Mentoring is a one-to-one relationship between a mentor (an individual with expertise and experience) and a mentee (an individual who is new to a job). The relationship goes beyond telling the mentee how to do a task, to offering advice, and providing insight into why the task is important to the organization. These relationships can be assigned by leadership when a new manager is hired into a department or organization,or they can be self-selected by an individual when they feel a need to learn more. The relationship lasts until both the mentor and mentee feel it is no longer mutually beneficial. Depending on the training plan, this could be a few weeks, months,or years.

Building a mentoring program should include the following framework:

- **Determine how long the relationship lasts:** Will it be based on time or when a specific skill is mastered?

- **Secure participation from all involved:** This will include both the mentor and mentee's management.

- **Match mentor and mentee:** Ensure that both individuals have a common interest and similar goals.

- **Empower both individuals:** Mentors can gain from hearing a fresh perspective on their common interest. The mentee should feel empowered to share their opinions and thoughts with the mentor.

- **Provide feedback:** Establish an open dialog so feedback can be shared; this helps in understanding when a mentoring relationship should end.

Coaching: Coaching is a personalized instructional method that has a more experienced individual helping someone less experienced achieve a set goal. The goal or new behavior is determined by the individual being coached. Focus should be the task or skill and ends when the learner no longer needs help performing the task. It involves providing the learner with both practice and positive reinforcement.

Sir John Whitmore introduced a coaching model that is widely used and easy to implement. The model uses the acronym GROW.

	Definition	Example
Goals	The person being coached determines the goal, and it should be reviewed at the beginning of each coaching session.	The individual would like to improve their written communication.
Reality	Determine the skills or knowledge needed to achieve the goal. Discuss the current reality of where the individual is in achieving the goal.	Review samples of the individual's written communication.
Options	Discuss the options available to achieve the goal.	Both individuals share suggestions for improving the written communication prior to sending it to the audience.
Way Forward	This may also be referred to as the wrap-up. The person being coached decides which option they will use going forward.	The individual will read the communication out-loud and make corrections to clarify the message.

Understudy: An understudy will learn how to complete more advanced task(s) with the guidance of the manager. This may be referred to as a "stretch assignment." For example, in a clinical setting this may involve having a healthcare worker acting as part of the immunization forecasting team.

Apprenticeship: An apprentice works with a master or highly-skilled worker. In return, the apprentice agrees to work for little or no wages until the master, acting as a teacher, determines that the apprentice has the skills needed to perform the job. Typically, the student first learns the basic information through formal learning. Then the master will increase the apprentice's responsibilities until the apprentice is competent at the skill. Apprenticeships are typically done in partnership with a school or institution and are a formal type of OJT.

Annex 1 lists each of these methods along with when to use it and how to get started.

What to Consider When Using OJT?

When creating any learning experience, the desired outcome should be the first consideration. To determine the best solution, consider the skills being taught and whether there are enough skilled OJT instructors to train the workforce. Is the risk level of the task low enough to avoid putting patients at risk? Keeping the outcome in mind, there are a few key factors you should consider when selecting any instructional method and on-the-job training:

Is the behavior performance-based?

When a behavior is performance-based and observable, you can determine whether the learner is performing or not by using a simple checklist. The checklist is easy to create when the task is well-documented. However, cognitive behaviors are not as observable. The results of a cognitive decision will be evident, but the process the learner went through is not as visible. A checklist may be difficult to use in these situations.

What is the risk if the behavior is not correct?

Before deciding if the behavior can be learned through OJT, you should assess the risk factors associated with the task. For example, if a worker misses a question on the healthcare intake form, they will need to go back and make the correction. This behavior involves little risk. On the other hand, if a worker forgets how to handle a used syringe, they could put themselves and those around them at risk of being hurt. If the behavior is high-risk, it should be performed in a safe, simulated environment before it is done on the job. In most cases, OJT can be used in addition to the simulated environment.

Low-Risk Behaviors	High-Risk Behaviors
• Gathering client medical records • Greeting a client • Shipping and receiving vaccines or other supplies	• Administering a vaccine • Disposing of used needles • Performing minor surgical procedures (i.e. suturing)

Is there an experienced expert who can train others?

Who will be doing the training is as important as what they will be training. There are many people who are experts in their field but who cannot explain what they do or how they do it. Teaching someone requires the ability to listen to the needs of the learner, clearly communicate what is happening, and provide both positive and negative feedback to the learner. The trainer must also have the patience to let the learner fail in a safe environment.

Here are a few questions to ask when selecting an OJT trainer.

• Has the individual mastered the skills to be trained?

• Does the individual have the desire and ability to help others be better?

• Are their performance expectations aligned with the learners' needs?

• Does the individual exhibit the patience needed to teach?

• Will the trainer see this role as a reward for excellent performance, or will they look at it as punishment?

• Will the additional responsibility overwork the trainer?

Who should participate in OJT?

Consider the learner and the environment they are working in when deciding if OJT is the right method of training. OJT works well when the learner is motivated to learn and is ready for change. One way to identify motivated learners is to ask them to volunteer or self-select for the training.

Here are a few questions to ask to determine if the learner is right for OJT.

- Are they motivated to change, or do they need additional information to show the benefits or reason for learning the new skill?

- Will they need additional information to perform the task?

- Is the task performed frequently enough to reinforce the learning?

These simple questions may help when making the decision to use OJT as a method. If the answer to one or more of the questions is YES, OJT may be a viable solution.

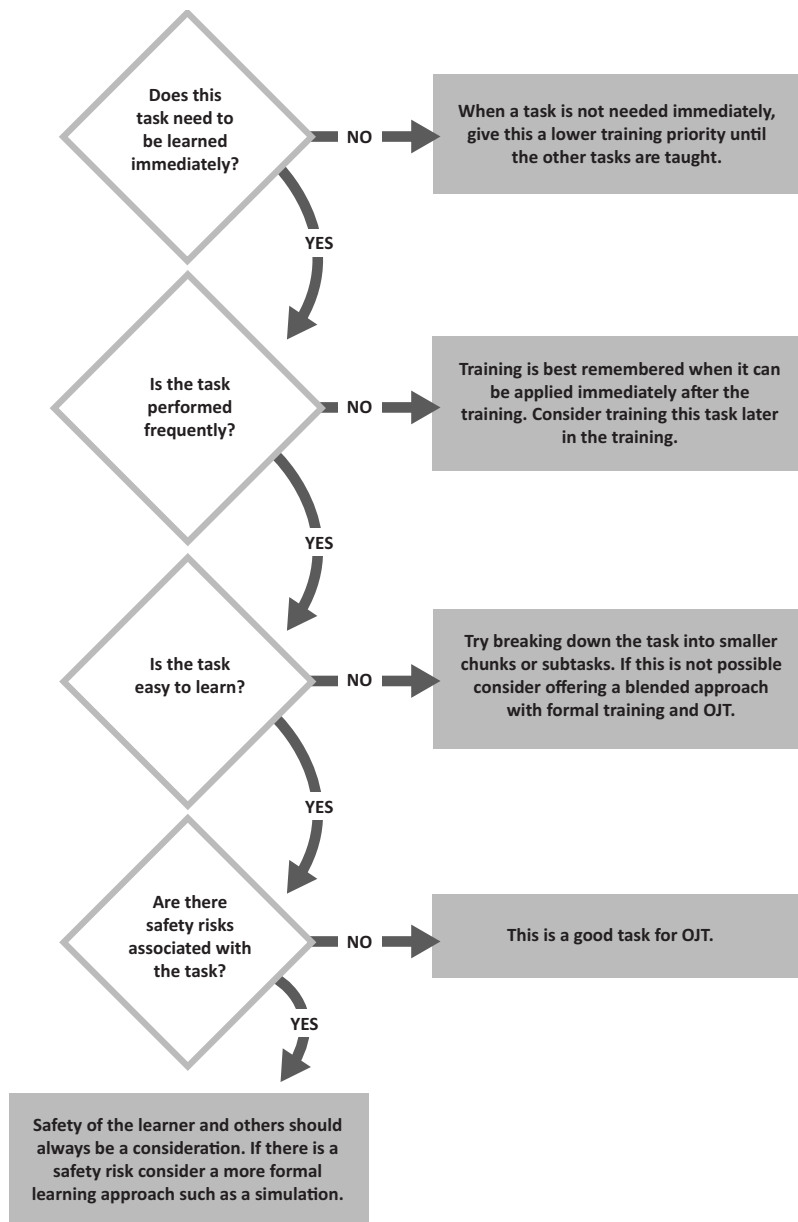| Yes	No	When to use OJT
		Are there sources of expertise in the workplace with the time and inclination to teach others?
		Can there be variations in how the skill is taught?
		Is the skill used infrequently?
		Is this a skill that is not critical to operating safely?
		Are there resources available for the learner?
		Is it a skill that everyone in the organization needs?
		Is there a way of knowing if the learner acquired the necessary skills?
		Do the OJT trainers have enough knowledge about learning and coaching to apply that to an OJT situation?

How to Get Started

Deciding to use an OJT strategy is done after the analysis of the problem and during the design of a learning solution. If OJT is the solution for the performance challenge, it starts with identifying and analyzing the tasks of the job and concludes with training the learner on the job.

```
Perform Task      Identify OJT      Gather            Set OJT           Conduct OJT
Analysis          Trainer           or Create         Schedule
                                    Documentation
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Adapted from Training on the Job by Diane Walters

Perform Task Analysis:

Begin by determining the tasks that will be taught on the job. This can be done by meeting with an expert or the OJT trainer, if they are already selected. A task list can also be obtained from a well-written job description if an expert is not available. After the tasks are identified, determine the following:

Does this task need to be learned immediately?

NO → When a task is not needed immediately, give this a lower training priority until the other tasks are taught.

YES

Is the task performed frequently?

NO → Training is best remembered when it can be applied immediately after the training. Consider training this task later in the training.

YES

Is the task easy to learn?

NO → Try breaking down the task into smaller chunks or subtasks. If this is not possible consider offering a blended approach with formal training and OJT.

YES

Are there safety risks associated with the task?

NO → This is a good task for OJT.

YES

Safety of the learner and others should always be a consideration. If there is a safety risk consider a more formal learning approach such as a simulation.

Identify OJT Trainer: Take time when selecting the OJT trainer. Not all top performers will make good trainers. They should have a complete understanding of all the tasks identified and the patience to explain them to others. Refer back to the ***What to Consider When Using OJT*** section for a list of key questions to ask.

Gather or create documentation: Support during and after the on-the-job training is important. This support could be a procedure manual or a simple job aid. If these do not exist, work with the OJT trainer to help create support documents. An important document to create with the trainer is an assessment or competency checklist. The trainer can use this to determine when the learner is ready to work independently.

Set OJT schedule: Set a schedule for the OJT. It can be as simple as an agenda with the topics/tasks and when the trainer will conduct the training. This helps keep the OJT trainer on task, provides consistent training across all OJT trainers, and allows the learner to prepare for each training session. It also allows the learner's manager to schedule other activities around OJT.

Conduct OJT: Use the OJT schedule to conduct the training. Following a schedule keeps the training on task and sets a timeline for the training.

Annex 1: On-the-Job Training Strategies

Method	When to Use	Definition	Getting Started
Job Instructional Training	Performance-based behaviors or tasks	Learners observe the OJT trainer in the work environment performing the task and explaining what they are doing. When the OJT trainer feels the learner is ready, the learner performs the task and the trainer gives feedback on the performance.	• Analyze job-specific tasks • Select an experienced expert • Develop a competency checklist for the OJT trainer to complete
Job Rotation	Performance-based behaviors or tasks	Job rotation moves learners through different roles or tasks within an organization to develop new skills and bring a new perspective to existing work. The rotations can be short term (days) to long term (years) depending on the complexity of the work.	• Determine which skills will be part of the rotation • Select the participants for the program • Determine the length of the rotation • Develop a competency checklist or review after the rotation is complete
Mentoring	Cognitive behaviors	A one-to-one relationship between a mentee and mentor. The goals and length of the relationship are established together.	• Determine goal of the mentorship • Empower the individuals to achieve the goal
Coaching	Performance-based behaviors or tasks	Personalized instruction given by an experience expert. Coaching can be used for both performance-based and cognitive behaviors.	• Determine the need for coaching by assessing the learner's current ability • Use the GROW model to structure the coaching sessions
Understudy	Cognitive behaviors	Building competency through tasks typically done by the next level manager. Competency is determined by how well the task was completed.	• Determine a task(s) that can be assigned to an individual • Provide direction and guidance
Apprenticeship	Performance-based behaviors or tasks	Formal program that combines formal learning with job instructional training. Most commonly used for skilled occupations.	• Formal program of traditional classroom learning and OJT training

Annex 2: Resources

Explore these resources for more information about On-the-Job Training.
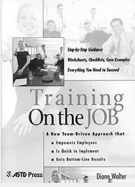
Training On the Job
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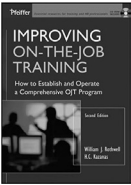
Improving On-the-Job Training
How to Establish and Operate a Comprehensive OJT Program, by William J. Rothwell and H.C. Kazanas

On the Job Training — Pros and Cons
Explore Adult Learning, by Jeff Durham
http://www.exploreadultlearning.co.uk/job-training-pros-cons.html

Top 11 Advantages and Disadvantages of On-the-Job Training
by Chitra Reddy
https://content.wisestep.com/advantages-disadvantages-job-training-methods/

How On-the-Job Training Brings You Value
The Balance Careers website, by Ron Cowan and Carolyn Hansen
https://www.thebalancecareers.com/how-on-the-job-training-brings-you-value-1917941