Going Virtual:

Can You Develop Safety Leaders Remotely?

White Paper

Can the virtual learning environment be effective in developing safety leaders?
The answer is unequivocally yes.

DEKRA On the safe side

Definitions for the purpose of this paper:

Training:

The transfer of information

Development:

Acquiring new skills and sustained skills application

The open question about virtual delivery is whether you can use this approach for development. In our definition of development, we are not talking about short-term behavioral change. Instead, we are referring to development that generates a change in a person's belief system, resulting in long-term behavioral change. This change in belief systems means that when the person reverts to the old way of doing things, something feels fundamentally wrong, causing a return to the new behavior.

DEKRA's approach is to create change in leaders to such an extent that there is a change in their team's safety climate and, ultimately, a change in the organization's culture. This work is designed to give leaders a new appreciation of their role in creating a safety climate and culture (transfer of knowledge) and in the development of new skills that maximize the impact of their safety activities.

DEKRA began making the transition from face-to-face safety leadership development to virtual development in 2019. The reason wasn't related to COVID-19; instead, the transition was due to the financial necessity of one of our clients who needed to cut costs by reducing travel expenses. Initially, the shift to virtual delivery shocked everyone involved and especially challenged those tasked to develop, learn, and apply new skills.

The Difference Between Training and Development

Virtual training is common for most industries and has been for many years. For some, virtual training is about the transfer of information. We can even verify through testing whether the person on the other side of the screen understood, or at least repeat, the information presented. But virtual learning is about more than just transferring information. Virtual learning can lead to a change in a person's behavior, otherwise called development. However, development is dependent on the person's deciding to implement what was learned and on the supportive system built around driving that change.

The endpoint of this development is a reduction in both exposure and injuries.

Yet the modified approach worked because both parties committed to making it work. Both had to experiment, had to be allowed to make mistakes, and had to learn from those mistakes. This one experience helped DEKRA prepare for the impact that COVID-19 made in our industry the following year, when almost everyone was forced to make the switch from in-person to virtual interaction.

In our development work, we have used a variety of virtual methodologies to achieve success, including group training and individual coaching. In doing so, we have identified the following keys to success.

Keys to Successful Virtual Development

Before the Virtual Training

Get managers comfortable with the technology.

Before the training, hold a session on how to use the technology and outline the full development plan. Verify that everyone can successfully log in to the training platform. This may seem obvious; however, a barrier to learning is when people struggle to use the technology or feel uncomfortable using all the tools available in the virtual delivery. People may also stay quiet because they feel embarrassed to admit they don't have the skills to navigate the technology, which will make them miss out on the learning.

Prepare the most senior leader.

The most senior leader needs to have a significant role in the virtual delivery and must be active throughout.

Before training the target audience, train the Leaders of Leaders (LoL) on effective coaching.

Development is a multistep engagement. There is the virtual environment, but a crucial element is taking the new knowledge and skills to the workplace and applying it. To ensure that the participants can apply the new skills, they need to be observed and coached. Ultimately, the manager must participate and lead this part of the developmental effort. Coaching and mentoring should continue as long as required to ensure successful application.

Install a data-collection system.

Make sure that the data-collection system is ready to go and will be used by leaders to track information about what they find when they are conducting their crucial safety activities.

An important factor in development is that once the classroom interaction is complete, the new leader needs to:

- Almost immediately put the new skills into practice.

- Document the experience and the findings, and reflect on the experience.

- Continue the tracking to sustain the change.

During the Virtual Training

Limit group size to up to 12 people.

It is so easy to think that since it is a virtual classroom, you should pack people in. After all, it means that fewer overall classes would be offered. Huge classes are fine for training, but they don't work for development. A key to development is the level of participation that each attendee has in the virtual classroom.

Limit the use of breakout sessions.

This may contradict the first principle, but when a facilitator sends teams to breakout groups in a virtual environment, there will be significantly less ability to monitor for issues and remove obstacles, compared with a face-to-face environment. Therefore, breakout sessions might hinder learning . Instead, utilize exercises that require high levels of participant engagement and discussion.

Breakout sessions are useful for up to 12 people. In this situation, have team leads for each breakout group who can act as facilitators.

Introduce new concepts in small doses, but new skills in large doses.

When considering the time allocated for virtual training, ensure that the time spent introducing new conceptual models or frameworks is kept to a minimum. Allocate the bulk of the virtual training on engaging activities that build, practice, and reinforce skills.

End the session with a call to action.

This call to action needs to be predetermined and introduced by the most senior leader in the session. It must include a specific action for all participants, with an expectation that they will track their actions in the data- collection system.

After the Virtual Training

Require the immediate application of the new skills after the session.

Use field coaching.

Have a recurring Zoom call scheduled with the leader. The classroom environment is just one element in the learning process. But for skills development, ongoing coaching is pivotal because it gives leaders confidence to perform what is being asked.

One of the roles of a (LoL) is the development of their direct reports. Yet this is one of the most difficult because LoLs must observe the direct reports in action, and this requires a knowing how to coach. For development to work, ongoing coaching must be a part of the process. Ideally, the coaching is done by the LoL. However, many companies have found ways to use expert coaches who are teamed with the LoL to develop their staff. While the model may vary, what is important is that the trainees feel that what they are doing is valued and that they are supported in their personal growth.

Utilize the data.

It will reinforce the behavioral change and address the exposures identified in the field.

Conclusion

Virtual learning is changing how we develop and train employees. But one is not like the other. Training is the transferring of information from one person to the next, which is fairly easy to do via our desktop and tablet screens. Development requires more because it is inevitably about sustaining change in the culture. For this reason, development requires a tremendous amount of preparation and involves a series of learning activities that can be revisited over time. In our work with clients we have found that development is possible in the virtual environment. Not only are leaders growing and changing, but the organizations are seeing a change in the culture and a significant reduction in injuries. The key to success for DEKRA and our clients has been the partnership created in working together. We have had our shares of challenges, but our clients have been invested in making this work. They have specific safety objectives they want to achieve, and the senior leaders have demonstrated a deep level of commitment to achieve them.

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➡ Contact Us

Connect with us:

Email us: osr.info.us@dekra.com

Call us: +1 805-646-0166

Website: dekra.us/consulting

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