Going Virtual:
Can You Develop Safety Leaders Remotely?

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Definitions for the purpose of this paper:

Training:
The transfer of information

Development:
Acquiring new skills and sustained skills application

Can the virtual learning environment truly be effective in developing safety leaders? In doing this work for nearly a year now, we can unequivocally say the answer is "Yes!"

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 or not the person on the other side of the screen understood, or least can parrot back, 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 deciding to implement what they have learned, and the supportive system built around driving that change.

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 back to the old way of doing things, something feels fundamentally wrong and they 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 the development of new skills that maximizes the impact of their safety activities.

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

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 it was due to the financial necessity of one of our clients to cut costs by reducing travel expenses. The shift to virtual delivery initially shocked everyone involved and especially challenged those tasked to develop, learn, and apply new skills.

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 to learn from those mistakes. This one experience helped DEKRA prepare for the impact COVID-19 made in our industry the next year, where 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 both 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.

Prior to training, hold a session on how to use the technology and outline the full development plan. Verify that everyone can successfully log into 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 senior most 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 multi-step engagement. There is the virtual environment, but a crucial element is taking the new knowledge and skills to the workplace and applying it. To assure the person can apply the new skills they need to be observed and coached. Ultimately, the person's manager needs to participate and lead this part of the developmental effort. Coaching and mentoring should continue as long as required to assure application.

Install a data collection system.

Make sure 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, the findings and reflect on the experience.

- Continue the tracking to sustain the change.

During the Virtual Training

Limit group size to 12 people or less.

It is so easy to think that since it is a virtual classroom, you should pack people in. After all, it means fewer overall classes have to be offered. Huge classes are okay for training, but they don't work for development. A key to development is the level of participation that the person 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, they have significantly less ability to monitor for issues and remove obstacles than in a face to face environment. Therefore, breakout sessions can be more of a hindrance to learning than a help. Instead utilize exercises that require high levels of participant engagement and discussion.

Breakout sessions are useful when you keep the group to 12 people or less. In this situation, it's valuable to have team leads for each breakout group to 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 to introduce new conceptual models or frameworks is sculpted down to the absolute minimum necessary. Spend 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 pre-determined and introduced by the senior most leader in the session. It must include a specific action for all participants with an expectation that they will track their action in the data collection system.

After the Virtual Training

Require the immediate application of the 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 skill development, ongoing coaching is pivotal to give the leader the confidence that they can do what is being asked.

One of the roles of a leader of leaders (LoL) is the development of their direct reports. Yet this is one of the most difficult aspects of the position because to coach you have to see your direct report in action, and you need to know how to coach. For development to work, ongoing coaching must be part of the process. Ideally this 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 learners must 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.

Learn More **Interested in learning more? Connect with us:**

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