Business Services Training Project

Facilitator’s Guide

Module 1: Roles and Responsibilities of Business Services Representatives

Session 1-1: Four Primary Roles for Business Services Staff

Contents

- General Presentation and Preparation Tips
- Slide-by-slide Presentation Notes

Resources

Available at http://businessengagement.workforce3one.org/

- Recorded Webinars
- PowerPoint Templates
- Webinar Transcripts

Business Services Training Project

- Multi-series of training sessions designed to increase, expand and improve the capacity of Business Services Staff employed by publicly-funded workforce development organizations nationwide.

- Funded by the United States Department of Labor, Region 4 Employment and Training Administration.

- Developed and delivered in collaboration with the Texas Workforce Commission and Utah Department of Workforce Services.

- Curriculum, training sessions and facilitator’s guides were developed and delivered by Melanie Arthur, Greg Newton Associates.

Spring 2012
Introduction

The Department of Labor’s Employment and Training Administration (ETA) is complementing its overarching business engagement strategy with a focus on front-line staff skills development. ETA built the Expanding Business Engagement website to ensure that cutting-edge resources were available to front-line staff that need them most. The site began with a focus on showcasing electronic tools for staff who work with business, but it has grown into a larger effort that encompasses the broad spectrum of business engagement strategies and activities that go on in local and regional communities across the country. Most importantly, this curriculum has been road-tested by local workforce system staff from across the country. In fact, they are featured presenters in many instances and their great work inspired us to feature it on the site.

The site content is available at http:\businessengagement.workforce3one.org and features modularized content and facilitator guides on a variety of topics and tools that will engage business including competency models, Labor Market Information (LMI), and how to use social media. We are so pleased to add this series of training modules that get to the heart of building long-term relationships with customers, defining business services based on employer needs, and recruiting and hiring in today’s economy.

We invite all of those dedicated professionals who work with employers in the field to join in a collective conversation with other workforce professionals from across the country using the site’s LinkedIn account. There you can share your own experiences with the site, the curriculum and ask and receive ideas from colleagues and experts.

We hope this exciting curriculum continues to expand your own business engagement efforts!
Project Overview

The Business Services Training Project is a series of training sessions designed to increase, expand and improve the capacity of business services staff employed by publicly-funded workforce development organizations across the nation.

The project was developed and delivered through the collaborative efforts of the Texas Workforce Commission and Utah Department of Workforce Services, with funding provided by the United States Department of Labor, Region 4, Employment and Training Administration. Curriculum, training sessions and facilitator’s guides were developed and delivered by Melanie Arthur of Greg Newton Associates.

The 13 training sessions are divided into four modules and include:

Ten sessions, delivered and recorded as webinars

1. **Clarifying the Roles and Responsibilities for Business Services Staff**
   - 1.1 Four Primary Roles for Business Services Staff
   - 1.2 Recruiting and Hiring Has Changed
   - 1.3 Building Relationships with the Business Community

2. **Developing and Aligning Services with Demand**
   - 2.1 (Re)Defining Business Services Based on Business Needs
   - 2.2 Aligning Job-seeker Strategies with Business Needs and Hiring Practices
   - 2.3 Process and Service Improvements for Job-Seekers to Ensure Quality Referrals
   - 2.4 Collecting Information and Ensuring Business Satisfaction.

3. **Marketing and Outreach Strategies**
   - 3.1 Strategic Marketing to Business Customers
   - 3.2 Target Marketing and Business Account Management Strategies
   - 3.3 Outreach to Businesses: Tips, Tools and Tactics

Three training templates,* not delivered as webinars

4. **Demand-driven Workforce Development**
   - 4.1 Understanding the Current Economy and Business Market to Develop Targeted Industries or Sectors (based on state/local LMI)
   - 4.2 Identifying Current Workforce Development Challenges in Targeted Sectors for Development of Service Delivery Solutions
   - 4.3 Demand-driven Alignment: Strategize and Plan for Success

*These sessions are described as templates and were not delivered as webinars because the content is designed to specifically relate to a state, region or local area. As templates they require a significant amount of editing. The relevant facilitator’s guides include instructions to convert the templates into training presentations.
Project Resources

The following resources are available in order to support capacity to train staff:

- **PowerPoint Documents**: Overall, the full curriculum is divided into approximately 1-hour to 1.5-hours training sessions. Each of the 13 sessions has a specific PowerPoint document; which may be used as “templates” for trainers to customize and edit based on specific training objectives and audience. Recommendations for slide-specific edits are included in the relevant “facilitator’s guides.” Also, trainers may wish to combine topics/slides for longer sessions (i.e., half-day classroom training), or reduce content-per-session to allow time for discussions and participant interaction (i.e., 1-hour webinars).

- **Recorded Webinars**: The first ten training sessions were delivered and recorded as webinars between April – June 2012, with business services staff in Texas and Utah participating via internet connection. These recorded webinars serve as training tools for trainers in two ways: 1) as a review of concepts and information needed for instruction; and/or 2) as an instructional tool that may be directly presented, in full or in part, to training participants. Each recorded webinar is approximately 75 minutes long.

- **Facilitator’s Guides**: Each of the 13 sessions has a specific “Facilitator’s Guide” that includes slide-by-slide presentation notes, recommended edits, sources and links to information used in the slides, and supplementary resources. Additional details on the guides along with other presentation tips follow.

- **Webinar Recording Transcriptions**: For assisted learning, a transcript of each webinar was produced.

The Facilitator’s Guides

The goal of the facilitator’s guides is to support your ability to present with confidence the concepts in each session, and to help ensure optimal learning events. With the combined resources of the recorded webinars, PowerPoint slides and facilitator’s guides, your primary task will be to transform and edit the materials into training sessions that are ideal based on your specific situation, objectives and audience. To that end, each facilitator’s guide is written to supplement your knowledge, provide suggestions for presentation methods and recommend specific types of edits (all described in more detail below) to put you in the best position for success.

This role of “curriculum editor” is a critical step to ensuring the best results. It is important to keep in mind that the recorded webinars and PowerPoint slides were developed for a national audience, and cover the broadest combination of scenarios. For example, concepts applied are intended to address the continuum of staff experiences – from new employees just beginning their jobs as business services staff to those with several years of experience. Also in order to cover a broad audience, many of the slides contain larger amounts of information/text than is generally recommended; however, once your training audience and objectives are more specifically defined, you can select pertinent information to present, while deleting concepts that are too basic, too advanced, or irrelevant.
In addition, a wide variety of different organizational structures were anticipated in the original webinars, so some ideas are more appropriate to areas that have a business services team, and may not be feasible for smaller Centers with only one business services representative. Again, your role as “editor” of the materials is a critical step to ensuring the best results.

The following sections of the facilitator’s guide include a general description of the content, a sequenced outline of the preparation steps recommended, and a list of other pre-presentation activities. Note: This section (“Preparation and Presentation Tips”) appears at the beginning of the first guide (1-1); in all remaining guides it is at the end, following the slide-by-slide presentation notes.

**Content Overview**

Under a reduced image of the slide, the presentation notes cover three general areas:

1. The first bullet on a slide is generally used for relevant “preparatory” information. This includes: a) hyperlink to reports/articles cited on the slide for review, and b) a reference to the session name and slide number if the slide, or data on the slide, is used in another session. In addition, recommendations for revisions to content are usually found in this first bullet.

2. To set the appropriate context for each slide, a bulleted note entitled “Introductory Remarks” describes the general concept(s) to be covered. The introductory remarks are then followed by information intended to supplement or expand on the presentations such as general background information on concepts, and links to research or reports to expand your knowledge. As with all training you deliver, you will first want to clarify objectives and your audience and edit the content to meet those specifications.

3. Some of the content in the presentation notes are suggestions and ideas for presenting the training based on different formats (e.g., classroom, webinar, etc.) Ultimately, this depends on you as a trainer and the training format options available. Because the original webinars were delivered to a large audience from across two states, the environment was not always conducive for certain interactions such as large group discussions or facilitated small group discussions. However, these are important learning dynamics that are strongly recommended for use throughout your sessions, as well as other “action planning” activities based on your format, training, audience and objectives.
The content of the training sessions and notes in the guides does not account for the variations in state/local area service delivery models and policies. Trainers’ edits to the content and presentation should reflect these area-specific models, policies and other unique requirements (such as “approval processes”).

Here are some additional notes related to the facilitator’s guide content:

- Presentation notes are organized slide-by-slide, reviewing relevant information to deliver during your presentation. Each slide is inserted into the Facilitator’s Guide for reference only; they are reduced in size and may be difficult to read. For this reason, it is recommended that you follow presentation notes with a print out of the original PowerPoint (PPT) – available at [http://businessengagement.workforce3one.org/](http://businessengagement.workforce3one.org/).

- The notes in the facilitator’s guide are not a “transcript” of the recorded webinars, so not all comments and information on the recordings will be repeated here. However, all primary concepts have presentation notes. After first viewing a webinar, these presentation notes are used to complement your own knowledge and notes.

- In many cases, background information is also provided, not necessarily for presentation purposes, but to ensure trainers are familiar with information that supports the concepts being presented.

- Within the PPT slide deck for a session, some slides may be repeated from previous or subsequent sessions – usually as a brief review and segue, and/or in order to present information relevant to the specific concept covered in the session. Any new information for a repeated slide is included in the guide, and the location of the slide’s other presentation notes (name/number of original session) is provided for reference. When relevant, previewing information provided in a different session is recommended in the notes.

- When needed to direct you to specific elements on a slide, presentation note details are organized with a numeric code (➊, ➋, ➌) inserted next to particular item(s) or areas on the slide.

- This “scissors” icon is placed next to images or charts on the slides to indicate an opportunity to customize the slide by inserting a different image/chart. For example, national data is used on various slides throughout the sessions; however, the content is more relevant to your audience if these charts are replaced with state/regional/local information. (See additional details under “PowerPoint Slide Edits” below.)

- While written as imperative instructions (i.e., “ask,” “state,” “say”), comment notes are essentially a narrative of information to “put into your own words” and present. In addition, for those sessions delivered in a training session with a live audience, some additional recommendations for interactive discussions are included. Use your judgment as a trainer to create an optimal learning environment for activities that fit the method you are using (webinar, classroom, or webinar/classroom combination).
As an additional resource, or to specifically capture comments that you heard on a webinar that are not included in the guide, a transcript of each webinar is available at http://businessengagement.workforce3one.org/.

Recommended Sequence of Activities

The following is the general sequence of activities recommended to prepare for training:

1. View the recorded webinar(s) relevant to the topic(s) for your training session; making your own notes on a printout of the PowerPoint. Note: each webinar is approximately 75 minutes; you may wish to combine topics for a half-day, or full-day session. Webinar recordings and PowerPoints are available at: http://businessengagement.workforce3one.org/.

2. Then review the facilitator’s guide for supplementary information; available at: http://businessengagement.workforce3one.org/, and make additional notes as relevant.

3. Edit the overall content of the session, and individual slides, based on your format, training, audience and objectives.

4. Develop and note your own learning activities and interactions with participants, including action plans to ensure transfer of training.

Pre-presentation Tips

Familiarization with Sources and Use of Current Information

- Many of the slides include information, survey data, quotes, etc. drawn from subject matter reports, guides and websites. In each case, the source of the information (and name of the article/report, if relevant) is included at the bottom of the slide. A link to the source is included in the presentation notes. In order to feel confident with the material, it is recommended that you review the information/article/report in its entirety prior to your own presentation.

- In addition to expanding your knowledge, this review helps prepare you to answer questions that may arise during training. For example, if the slide reports data from a business survey, you may need to know details such as when the survey was conducted, the demographics of respondents, or the specific questions asked in the survey.

- You may find other information from the article/report to include in your presentation if relevant. For example, if “overall” survey results representing businesses of all sizes are used in the original webinar, you may want to feature responses from small businesses if available.

- Another important element to be aware of is timeliness of the data and information used in your presentation. The information (data, trends, screen shots, etc.) used in the original PowerPoint slides and webinars was current as of the recorded webinar presentation dates between April and June of 2012. When reviewing source documents online, check the website to see if more current information is available, and replace what was used in the original webinar and PowerPoint document.
PowerPoint Slide Edits

The following is a list of overall slide edits to consider prior to training.

- **Title Page:** Name and affiliation of presenter and training sponsor, and name of session (if combining several of the units from the modules).

- **Content Level:** As previously discussed, the training was developed to cover a wide range of current skill levels: ideas for beginners/new staff are included as well as those that are more appropriate for experienced Board-level business consultants. Therefore, the content needs to be edited to be specific to your audience. If slides cover information or ideas you have well in hand, then delete; if slides present new ideas, then you may want to add slides detailing how to approach and implement any new ideas. (Note: In general, the majority of content “as is” will be most suitable for advancing the knowledge, skills and capacities of staff at “beginner” and “intermediate” levels.)

- **Replace Various Graphics and Screen Shots:** Scan through the slides in the session to specifically identify those that require edited images or charts. An icon representing scissors (✂) indicates these known opportunities; however, the icon is not used to remind you to check for more current information than what is used on the slide. In general, there are three different types of edits:
  - **Data charts** - If a data chart displays the national unemployment trend for example, replace with a chart that displays your state/region/local area unemployment trend. The source for most data charts will be the state’s Labor Market Information unit, whose information is generally linked to the state’s workforce development agency site. If you are unfamiliar with this resource in your state, go to: State Labor Market Information Contact List.
  - **Screen shots** that appear on slides are drawn from a variety of (mostly national) websites that were used as examples in the original webinar (e.g., “Find Employers” on careeronestop.org). In these cases, replace with screen shots for the same processes or information from your state/local website. Using the state site’s “search” function is one of the quickest ways to locate the information, although you may have to try a variety of words/word combinations for search-engine success.
  - **Images** are also drawn from a variety of websites and may need to be replaced with correlating information from your state/local area. For example, the US Chamber of Commerce logo can be replaced with your state’s Chamber logo. If the image is a photo of a city, insert an image file representing your area.

- **Update Survey Charts and Tables:** Don’t forget to determine if charts or tables used on the slides need to be updated, based on more recent surveys for example. (As mentioned above, the data, trends, screen shots, etc. used in the original PowerPoint slides and webinars was current as of April – June 2012.)

- **Terminology:** Presentations generically refer to “business services staff;” this may be revised to reflect the title used by staff in your program/center (e.g., Employer
Representative, Business Consultant, etc.) Also, the term “Career Centers” is used throughout, and may be replaced with the specific name of your one-stop centers.

Sharing Ideas and Trainee Participation

The method for presentation of “promising practices,” and options for dialogue and trainee participation during the session will depend on the presentation format.

- Collection of promising practices may be done in advance of the training and presented at appropriate times during the session.
- If conducting a live webinar, managing participation with attendees needs to be determined in advance (based on the options available with webinar technology and size of the training group).
- If you are in a live classroom setting, there are several opportunities to engage in small and large group discussions where ideas can be shared.
- However you have planned for sharing ideas and promising practices, describe it when you get to this item, while the “Session Topics” slide is displayed.

Resources for Special Needs Trainees

Transcripts of the recorded webinars are available at http://businessengagement.workforce3one.org/.

Additional Questions?

This package of training resources attempts to provide comprehensive information to prepare trainers for a wide variety of situations. A select group of reviewers from across the country provided feedback on content, format and clarity. However, not all questions can be answered in advance, nor will all information be clear to all readers. If you have any additional questions, please feel free to contact Melanie Arthur at arthurmel@aol.com. Be sure to specify the session title and slide # (if relevant) in reference to your question.
Title Slide Presentation Notes

**Presenter Introduction** -- General comments, i.e.:

- Introduce self, or be introduced by “sponsor.”
- Introductory “welcome” to participants; comment on “pleased to be presenting” session; thank you to any co-sponsors, funders, leaders etc. if relevant.
- Announce name of session; describe as first in series (or revise comment to describe your approach to sequence and choice of sessions that you will present.)
- Three sessions in Module 1 are all related to the “Roles and Responsibilities of Business Services Staff.” If audience is mixed in terms of current titles and responsibilities, point out that the material applies to all staff who represent the public workforce development system to business, regardless of title.
- Overview of session/webinar timing (how long presentation, Q&A segment, and if held until end, etc.)

**Webinar Specifics** -- Any relevant instructions, e.g.:

- Technology instructions: connections, audio, mute/no mute; etc. and what to do if problems
- Instructions for use of webinar pods: Q&A, polls, chat, etc.
- Overview of participation options for attendees: how/when to ask/process questions, comments; status options (raise hand, agree/disagree); poll participation; etc.
Slide 2 Presentation Notes

1. Introduce the “Training Topics” as the primary focus of the training session.

   Topic 1: This topical area accounts for the majority of the content in the session. Describe roles not as “tasks” but as functional categories of activities in relationship to working with businesses. Provide a brief example of each as they are presented:

   - **Consultant:** knowledgeably providing advice and recommendations to solve problems and exchange information.
   - **Champion:** representing business needs internally in Career Centers to inform staff and customers of business requirements, processes and methods related to workforce development, recruitment and hiring.
   - **Connector:** Appropriately referring businesses to services that exist either within the public workforce development system or elsewhere in the community – that requires extensive knowledge of other related business services available in your area.
   - **Service Provider:** the most prevalent role, this relates to development, delivery and continuous improvement of high-quality services to businesses.

2. Topic items 2 and 3 are also briefly addressed. Discussion includes ideas for effectively performing the roles – expanding or enhancing what business services staff currently do. Acknowledge these are not all “new” concepts; many staff may already be actively engaged in these roles; the presentation is intended to complement their sense and overall organization of their job. Translating and transferring outcomes of activities to center colleagues and center operations is reviewed.

3. For item #4, see “Sharing Ideas” in the “Presentation Tips” at the end of this guide.
In order to process the session with participants all using a common understanding, start by introducing a “semantic” issue: the difference between “employer” and “business.” Ask participants to think about these two terms (pause); and if they agree that there is a difference. If on a webinar, ask for indication of “agree” or “raised hand” if agree; if in classroom, process the two questions as large group discussion.

Provide this distinction: a) “Employer” is best applied as a “role” most businesses engage in – i.e., hire workers; and b) “business” is a term that describes the entity more comprehensively as a whole. Further, ask if there might therefore be different ways to understand the terms “employer services” and “business services.” Ask: “Might business people think there is a difference?”.

Tell participants that the two terms will be distinguished in training as follows: a) “employer services” will be used in general to describe the recruitment and hiring services offered by centers; and b) “business services” will be used to describe a more comprehensive approach, e.g., including other human resource services.

Present some examples from the list to illustrate the above concept. Comparative statements about those you choose to present are constructed as follows: “Employer services focus on (insert example from the list on the left side), while more broadly, business services include or focus on (insert terms directly across on the list to the right).” Here are some examples (words in parenthesis are based on the lists on the slide):

- “Employer services primarily focus on individual hiring employers; while more broadly, the business-service approach focuses on serving industry groups, and industry-wide issues such as sector strategies.”
“Employer services focus on employers pre-hiring (what is needed) and when they are hiring (to provide candidates and facilitate the process); while more broadly, a business service approach focuses on human resource issues whether or not there is hiring – or that occur pre-and post-hire, such as retention; development of talent pipelines; current worker advancement; sector skill building; etc.

Sometimes, employer services means finding the best candidate – from the centers’ pool of unemployed jobseeker candidates; while more broadly, a business service approach sees the recruiting function as looking at all workers in the workforce, employed or not, to find the best candidate.

Clarify, that in terms of what centers have available, it is not an either/or; all have employer services, most have business services. As for semantics, “business services” includes “employer services” but not vice versa; employer services are significant in what centers do, but are just one type of “business service” available.

Note: it is only important if participants “generally” agree, as you are making the distinctions in relation to how these terms are applied to the training and potentially applied to services offered by the center. It is however important to point out that if business people think of these terms differently, then saying “employer services” may limit the marketing impact when in fact more broadly termed “business services” are available.

(In reference to the photos, and in summary,) “employer services are akin to the ‘classified ads’ and ‘business services’ take a look at a city/area full of companies.” For the purposes of training, we will present the distinctions as more than a semantic issues; it will be used to recommend clarification of terms for your center, its services, service development and delivery, resources, expansion, etc. For example, it is not unusual to see that many centers are primarily involved in improving quality and increasing customers for employer services, while also expanding into business services. The training session(s) address both of these.
Slide 4 Presentation Notes

- Reintroduce the four roles, noting that they are not sequenced by importance, but from “big picture” role, to the most specific “service delivery” role. In addition, point out that in Centers with teams or multiple staff, these roles may be assigned to different staff. For example, some staff may spend more time out in the community providing “consulting” services, while other staff may spend more time based in the Center providing the other three roles. In smaller centers, one person may be focused on one primary role, such as business services provider, and fill the other roles as needed.

- Here are some additional details and examples of what functions these roles encompass:

  **Consultant**: includes knowledge of - and providing access to - workforce intelligence; it is the role of advising businesses and being actively involved in the exchange of workforce information. This features - but is not limited to - what is most commonly referred to as “labor market information” such as data for wages, industry and occupational projections. However the role of consultant expands beyond labor market information to include knowledge of and access to economic and census data, other types of workforce reports, special studies related to the local region, awareness of what workforce development/human resource challenges exist, etc.

  Note: this role differs from “business connector” in that a consultant is more actively involved in “recommending solutions” versus making referrals to other services.

  **Champion**: This role is essentially the representative of business to the center’s staff, operations, and job-seeking customers. In this role, business services staff bring acquired knowledge from the business community - needs, requirements,
specifications, practices, standard processes, and more – into the Center to inform and improve operations, knowledge and service delivery.

**Connector:** As previously mentioned, this is the role of linking businesses to needed services across the full spectrum of the workforce development system (beyond just "my program"), other government services, and other business services available in the community. This role can be thought of as "system navigator" – connecting and accessing all the resources on behalf of businesses so that they don't have to puzzle through figuring out whom to call for what.

**Service Provider:** In this role, business services staff are initiating, organizing, coordinating, and delivering workforce development services to businesses. This role, which often accounts for the majority of his/her time, includes assessment of quality, satisfaction with services, and continuous improvement efforts.

- Indicate that the majority of the session will add details to each of the roles – further definitions, operational examples, resources, tips and tools, etc. However, the “Service Provider” role is only briefly discussed as there are other sessions that focus on services and service delivery.

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**Four Primary Roles for Business Service Staff**

**Become a Business Consultant**

- Develop targeted industry competence
- Monitor trade association websites
- Read business publications
- Attend business conferences
- Compile workforce intelligence
- Un-bundle, simplify, customize Labor Market Information
- Map and identify talent pipelines
- Convene focus groups and taskforces
- Host workshops and seminars
- Develop fact sheets and reports

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**Slide 5 Presentation Notes**

- As previously mentioned, the role of “business consultant” includes providing access to workforce intelligence and data, advising businesses and being actively involved in the exchange of workforce information. Business consulting may include representing your local Workforce Investment Board on committees or at various events, making
presentations on the regional and local economy, and ongoing interactions with business organizations to stay abreast of challenges, issues and business needs.

- In addition, in the role of consultant, business services staff may need to advise and update peers and coworkers on their activities, and how these activities contribute to the success of workforce development strategies and programs. Because the role of “consultant” typically entails a significant amount of time away from the Career Center, it is not unusual for other staff to misunderstand this role and how it contributes to performance and other outcome measures.

One of the ways the “business consultant” role contributes to center operations is described in the role of “business champion.” With business consulting, you acquire knowledge of business challenges, needs and practices; as a “business champion” you translate that knowledge and information into services, information and advice provided to job seekers in the Career Center. Knowledge acquired as a “business consultant” also informs your capacity to be an effective “business connector;” however, differs in that a consultant is more actively involved in “recommending solutions” and the “business connector” makes referrals to other services not available at the Center.

- If delivering an interactive session, ask participants in a large group discussion to offer examples of the qualities and activities of “a good consultant;” making notes on a flip chart/white board. If presenting a webinar, ask attendees to think about this (qualities and activities) and pause for a moment.

Present following examples (or add if not already discussed):

Knowledge and experience. Good consultants are very knowledgeable, current and relevant in their field, and have extensive experience solving customer’s problems.

Advice and recommendations. Consulting is more than advising, it includes direct knowledge of possible solutions - and recommending a course of action.

Credibility and rapport. Ask if participants agree that there is a difference between these two. (Indicate with “agree” status if on webinar.) If in live session, further ask for a definition of each, noting comments on a flip chart/white board. For clarification and/or in summary of discussion, state that: 1) “Credibility” is essentially customers believing you; trusting you to do what you say you will do; believing you know what you are talking about; and 2) “Rapport” refers to employer’s having the sense that you understand the business, their needs, their concerns; it is also about how you conduct yourself with customers.

- Note: Development of “consulting” services (or any service for that matter) must coincide with policy for your state/local area. For example, to avoid possible legal issues or misinformation most areas prohibit staff from interpreting HR laws and advising action on individual cases with individual employers. In other words, staff are not allowed to try to “judge” the particulars of how HR laws apply to an employer who calls and asks “What should I do with this employee in this situation.” However, providing general information on content of HR laws, or referrals to appropriate agencies or other departments is typically an allowable activity. Check with your agency/employer to make sure you
understand any policies that may govern development of new services or apply to activities for different staff roles.

- Review bulleted list on slide 5 with introduction: “Here is a sample list of consultant activities that can help you become -- or expand -- your role of consultant.” Add any relevant examples to items, i.e., customizing the list with examples from your area/state. For instance, when presenting the first bullet, you might say: “Developing industry competence in the targets established for our area/state (and then insert list).”

- To segue into the next slide, ask participants to think about the resources available to help them be effective workforce development consultants.

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**Slide 6 Presentation Notes**

- Introduce this slide as a sample list of organizations and sources of information to help Business Consultants build current, relevant knowledge, and connections to important resources. Review the items, adding any customized details (i.e., state/local website addresses); and including any examples of additional state/local resources. If presenting a live session, ask participants to share resources they find useful; while you make notes on flip chart/white board.

**Explanatory Notes**

Presenter should become familiar with websites and describe some; for example:

1. The Society for Human Resource Management (second item on list) [www.shrm.org](http://www.shrm.org) - provides extensive resources, data and information to Human Resource professionals; including regional/local chapters that business representatives may want to join. The site's
navigation includes access to legal issues, publications, templates and tools, research, education and more. By spending time on this website, business representatives can better understand their customers’ jobs, work environments, current issues, and more.

2 “General Business News” (item 5 on list): Alltop.com is an internet site that functions as a “magazine rack” of news. Based on monitoring the number of “hits” (i.e., number of users that access that item) for news items and information (across multiple categories), Alltop.com provides links to “all the top” news – those sites/items that have the most “hits”. Users can create an RSS feed list of news items that they want to regularly review. Instead of – or in addition to Alltop.com, alternative websites that provide state/local news can be inserted into the presentation.

Slide 7 Presentation Notes

1 Introductory comments: Part of your competence as a workforce development business consultant is knowing what the current human resource issues are, and which are currently the most challenging for businesses in your area. While the list of challenges, and their relative prioritization can change over time, it is important for you to have a general understanding of the most common issues that tend to be constant over time.

This knowledge can help your credibility when conducting a “needs assessment” with business. The consultant that is well versed in these common challenges and has done some basic research to identify the current “short list” can pose assessment questions that demonstrate this knowledge, e.g., “Based on my research, I know many employers are currently faced with (insert two or three of the challenges.) Which of these current issues are your most pressing challenges at this point in time?” This method of needs
assessment is more relevant than asking an employer open-ended questions, such as, “What are your needs” or “What are your current, most pressing human resource challenges?” Posing questions this way may appear as if the consultant does not have the knowledge about what the likely answers will include.

Describe the list on the slide. These are the ten most common human resource challenges over the past several years. They change in priority rankings depending on the economy and other issues. This list is not ordered by any priority, but constitutes the “general” content that answers the question: “What are the biggest human resource challenges that businesses are facing?” For good business consulting, the action required is to determine the most pressing issues at this point in time, and what the impacts are for businesses across industries or regions. Then build your capacity to “consult” with employers on those top issues.

Based on trends in your state/regional/local area, pre-select two or three of the challenges to point out as examples, and provide additional details. These trends, or human resource challenges, may be identified in recent “State of the Workforce” reports, sector strategy reports, economic development reports, etc. With two or three presented, plan to edit the following slide (#8) to include information and resource options related to the challenges. (See presentation notes for slide 8 for additional details.)

Briefly mention current examples of national trends (based on survey results that identify top national-level human resource challenges). These include:

1. Employee engagement and productivity
2. Leader/leadership development
3. Retention of current talent

The source for this list is: “What’s Keeping HR Executives Up at Night,” an annual survey conducted by Human Resource Executive®, September 2011; http://www.hreonline.com/. (Note: Additional presentation notes and details on this survey and the results are included in session 1-2, slides 5, 7, 9, 10.)

Background Information

The following content provides an overview of each of the ten challenges, pointing out the general impact on businesses. This is background information provided in order to understand the list of challenges, and is not intended to be presented in its entirety. (Note: This topic – understanding and responding to current human resource challenges – is presented in session 4-2, with additional details and context for this list provided.)

Globalization of the Workforce presents tremendous competition for employers, in addition to operational and management issues – recruiting, employing and directing workers from across the globe, or that work in locations around the world. One example includes Information Technology companies.
Rapid Advances in Technology are both operational challenges - deployment and implementation - and training/skill building issues for current employees. In addition this impacts increasing skill demands (item # 4) for new hires.

Skill and/or Labor Shortages – Some occupations experience a shortage of workers with the relevant, current skills in demand (e.g., health care, IT, sales representatives), while other occupations lack enough workers interested in the job or enough potential workers moving along a relevant talent pipeline (e.g., advanced manufacturing workers, biotech engineers, accountants). In some instances, an industry simply cannot find enough workers required to meet demand – even when training is provided or skills required are entry level (i.e., skilled trades, drivers, administrative assistants, call-center operators). (Note: These are national examples; state/local examples may be substituted. Source for national examples: ManPower Group “Hardest Jobs for U.S. Employers to Fill”, 2011.)

Increasing Skill Requirements – For the past few decades, the vast majority of job growth is occurring in occupations that require post-secondary education, calling for an increase in overall portfolio of skills and level of competence. This trend is expected to accelerate, meaning a HS diploma/GED may not be enough to compete for entry-level jobs; and advancement is dependent on a commitment to - and culture of - life-long learning…which is the next item, #5.

Lifelong Learning to Compete: Individual workers will need to accommodate their lifestyle to include regular participation in learning activities (e.g., Community College); and employers will need to operate with policies and benefits conducive to workers participating in ongoing training and education. Workers in the U.S. face global competition (item #1); wherever the best trained workforce exists is where the most successful economic outcomes will also be.

Talent Recruitment, Retention: The nature of the issues regarding recruitment and retention depend on: 1) the current economic cycle (i.e., recession preceded by expansion); 2) each industry and its cycle (growth, stability, decline); 3) worker availability (population and demographics); 4) geographical considerations (resources, infrastructure); 5) availability of education/training providers; and more. In fact, this list of issues coincides with the list of considerations that a business makes when deciding to open/relocate operations. Recruitment and retention issues are constantly in flux given the multitude of variations involved; and workforce development leaders must be constantly evaluating local/regional conditions to ensure that businesses have the right quantity of workers, with the right skills at the right time. In addition, the methods used to recruit and retain individual workers continue to evolve – which means regular impact on the weight and importance of this particular human resource challenge.

Workforce Diversity challenges can include: generational mix of the workforce (varying ages of workers and their work preferences); gender issues (EEO and affirmative action); nationality and race issues (EEO and affirmative action), including mastery of the English language; employing disabled workers; and more.
An Aging Workforce affects most employers given the population trend of “baby boomers” at or near retirement age, and fewer numbers of younger workers available. Retaining, training and employing older workers presents a host of human resource challenges, and its impact depends on the overall percent of these workers employed by an industry/individual employer.

Flexible Workforce: Policies are important to employers in order to meet the varying preferences of workers at different ages (teens/youth in the millennial generation; parenting/career advancing workers in GenX; retiring baby-boomers; older workers that want or need to work past retirement ages). Some of the affected policies may include benefits (family leave, deferred retirement), telecommuting, part-time options, work-sharing, and more.

Impact of Personal Life on Work: This issue overlaps with the last three: workforce diversity, an aging workforce and flexible workforce. It is listed as a separate item based on the trend of workers desiring more balance between work life and personal life. This is even more relevant when comparing older generations of workers to the younger generations. In addition to “family” leave policies being affected, other issues include: overtime, telecommuting options, pace of advancement opportunities, and adult day-care benefits along with child-care benefits (such as on-site family care facilities). Another example of “personal” life impact on work life can be seen among the preferences of the youngest workers in the country: when surveyed about criteria that impacted retention with an employer, characteristics of the corporate culture were reviewed. Millennials (born early ‘80s and after) regard the employers’ commitment to ‘corporate responsibility/volunteerism’ to be very important – by 2-to-1 ratio as compared to baby boomers (born mid ‘40s to mid ‘60s). In addition, millennials are also nearly three times more likely to say a “fun work environment” is important compared to baby boomers (35% to 19%). (Source: Talent Edge 2020, DeloitteConsulting LLP, May 2011; www.deloitte.com)
Slide 8 Presentation Notes

- Introductory comment: Once major challenges are identified, research on the internet is likely to produce ideas and options for solutions. Note: This slide is edited to reflect resources for the challenges you presented as examples on slide 7.

- Present the examples you have inserted onto the slide.

- The unrevised text on Slide 8 provides examples of information sources for several challenges on slide 7:
  - Flexible Workforce: If this is identified as a top challenge, then policies and options for workers to “telecommute” may be considered. The website cited above is an organization with information covering the broad spectrum of issues related to telecommuting.
  
  - An Aging Workforce: The term “gold collar workers” refers to employees close to retirement who have accumulated a wealth of hard-to-replace “credentials” and “wisdom”: extensive work experience; in-depth knowledge of the company culture; familiarization with unspoken practices, standards and processes; and first-hand information about how the company has changed over time. A large number of baby-boomers are reaching retirement age, so many employers are considering options for lengthening the employment of these valued workers. If this is a major issue in your area, explore the training program at UC San Diego which addresses “Gold Collar Programs.”
  
  - Workforce Diversity: There are many websites that explore the human resource challenges associates with employing workers from different age groups. If
“Understanding Generational Distinctions” is important to your area employers, the website noted is one place to gather research and information.

- **Skill Shortages, Increasing Skill Requirements:** This is generally on the top of HR challenges – to that end, an excellent resource for skill-building is promoted: an online source of free training that has been vetted for quality and learning outcomes. Topics include: business sessions, information technology, finance and economics, health and safety, personal development, diploma courses and languages.

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**Slide 9 Presentation Notes**

- Slides 9 and 10 discuss another type of important knowledge for the business-consulting role: data and sources for data on the economy, workforce and business community.

- Introductory remarks for this and the following slide (9 and 10):

  Another important aspect of business consulting is knowledge of – and familiarity with - the various sources of economic, business, labor force and other data. It is not necessary to memorize data, but to be able to: 1) quickly find and define data that answers employers questions; 2) present and explain data on the local/regional/state economy; 3) understand and discuss trends, reports, sources; 4) distinguish the methodologies used to collect and analyze data; and 5) use data in the proper context.

- This and the next slide are overviews of data sources; along with some resources for expanding your knowledge. For example, most of you are probably familiar with one of the important resources -- the economists who work in the "Labor Market Information"
(LMI) unit of your state agency. In case you don’t have it, that contact information is provided here: [http://www.bls.gov/bls/ofolist.htm](http://www.bls.gov/bls/ofolist.htm).

In this section of the slide, insert the name and URL for your state/regional/local source for labor market information, and describe the site’s features and overall navigation/contents. (Note: Additional slides with “screen shots” from the LMI site may be added to the PowerPoint to “visually” familiarize trainees with this resource.)

- If in an interactive session, ask participants to describe ways in which they have worked with an economist. Examples include: have them present workshops to local businesses; provide customized data requested by a local employer; discuss reports and data with the staff to ensure comprehension.

Present the data sources, website address and overview of the content for the sources on slide 9.

Prior to presenting this slide and the next slide, it is recommended that you spend time clicking through the homepage navigation on any of the websites listed that you are not familiar with. Find something new, unique, or of particular interest to highlight while you are presenting each of the sites.

**Slide 10 Presentation Notes**

- Presenting the national site listed in the first bullet of this slide.
- Describe the two remaining listings on the slide as “practitioner/user” and learning resources; and present each one.
The text box at the bottom is a link to a podcast where training and additional information about the data resources can be found.

- As with the other sites, familiarize yourself with these so that you can verbally describe content, and present examples of what trainees may find useful. Additional slides may be added to present sources of state/local websites, resources and additional training available. This is also where you can list, describe and promote any regular newsletters, data/press releases, and reports distributed by your state LMI unit, your region/area, or Local Workforce Investment Board.

- Summarize the presentation on “business consulting” role for business services staff: Business consulting is an emerging, growing role for business services staff; and includes giving advice and making recommendations; growing your knowledge in human resource challenges and solutions; and increasing your capacity for understanding and using labor market data.

- If in an interactive session you may want to facilitate a discussion (small group activity and/or large group) of possible action steps for improving/increasing/expanding the role of consultant.

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**Slide 11 Presentation Notes**

- Reintroduce the general description of this role: The “business champion” is essentially the representative of business to the Center – staff, operations and job-seeking customers. In this role, business services staff bring acquired knowledge from the
business community - needs, requirements, practices, standard processes, and more – into the Center to inform and improve operations, knowledge and service delivery.

- The next two slides are “examples” to present, with details to further clarify (as are presented on the webinar.) This is a sample list of ways that business services staff can “champion” the business; and can be customized to practices in your Center.

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**Slide 12 Presentation Notes**

- This slide is a continuation from previous slide.
- Summarize: these are examples of activities and concerns for the business champion role to help ensure that services model employer practices and meet employer needs.
- Note: In terms of expanding roles, this may be an easier one to start with. It takes your current actions/activities and builds on them. So in addition to gathering information about business needs and operations, you: 1) “translate” these to impact Center operations, 2) “communicate” these to other staff/partners; 3) “motivate” for response so that services and processes are more authentic to employers and the way they work. You (business services staff) know about changes and trends in employer operations – this role is about converting that knowledge it to action and response in the Center.
- As a segue to next few slides, state: “Now, let’s look at some details about what’s needed to be an effective business champion.”
Slide 13 Presentation Notes

- Introductory comments: The next two slides outline a process that begins with focus and knowledge, moves to analysis and action, and, is repeated for ongoing responsiveness.
- Present these qualities and requirements for performing this role effectively (continued on slide 14); expanding with examples and clarifications.
Slide 14 Presentation Notes

- Continue presentation of business champion requirements on this slide.

- In many cases the first several items, (all from the last slide and the first two on this slide) describe standard operations for business services staff. In order to convert that into a “business champion”, the only action that may be required is (third bullet above) formal methods for presenting data and promoting change.

- Ask for show of hands for staff who are already “business champions.” If in an interactive session, facilitate discussion of what they are currently doing. You may add to the discussion (or if on a webinar, present:) with some of the following options: staff/team meetings; staff suggestion systems; process improvement teams; ad-hoc groups.

- Present last bullet, and briefly promote continuous improvement. This last bullet essentially makes the process cyclical, going back to (the first two bullets, previous slide): “Focus on delivery, not just promotion,” and use of “Listening skills, not just sales skills” for ongoing responsiveness.

- For segue to next slide, state that “One of the outcomes of successfully performing the business champion role is known as “service alignment.”
Slide 15 Presentation Notes

- Introductory comments: Service alignment is when your Center’s services and service delivery methods and processes are modeled after the business community's methods and processes. A simple example would be when you learn that employers are using LinkedIn for recruiting, you ensure that this information is presented in a “job search workshop” so that job seekers who are most likely to (only) be on Facebook, create an account on LinkedIn as well.

  Alignment happens at a minimum at an “information” exchange level, as in the example just given. Job seekers are informed about employer processes, methods, etc. However, you can also align services directly through creating a LinkedIn "Users Lab" with dedicated computer space for job seekers to use and become proficient on LinkedIn.

- Note: There is a full session addressing the topic of service alignment (session 2-2), so the comparisons on this slide are briefly presented as examples of one of the major outcomes of the Business Champion role, i.e., service alignment.

- Describe the two columns: The column on the left contains categories of employer information, processes and methods that are researched and identified. The column on the right corresponds directly with the left column and identifies the “aligned” service at the Center.

- Select examples of alignment to present (as done on the webinar.)
Introductory comments: While the business champion role (previous few slides) is bringing employer information into the Center, the “business connector” role is linking businesses to needed services not delivered by your program or available in your center. In this role, you connect businesses to services across the full spectrum of the workforce development system, including other government services, and other business services available in the community. This role can be thought of as “system navigator” – connecting and accessing all the resources on behalf of businesses so that they don’t have to puzzle through figuring out whom to call for what service.

You can take it as a sign of “customer satisfaction” if business customers continually call you for information and referrals – in addition to services, it is recognition that you are helpful, knowledgeable and responsive. The reverse is also true: if you are helpful and responsive when referring businesses to other providers/organizations. Then, businesses may be more likely to use your services and become customers.

Review activities that improve the business connector role, as listed on the slide.

- The first three are fairly common for business services staff. A resource for general business services available in the area is the local Chamber of Commerce.

- For “referrals” and “relationship building” (bullet 4 - 5), encourage staff to go further in making the connection, with an individual’s name, recommendation and information about service available, instead of just an organization and telephone number. For this role to be effective, staff who answer the telephone need to be instructed to transfer all business calls to the business services staff; otherwise, the business caller
may just be “transferred” to another organization without the business services staff having an opportunity to “make a connection.”

- The last two bullets are business consulting level connections, helping to create “system” solutions that are available over time (in addition to the incidental types of connections described above.)

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**Slide 17 Presentation Notes**

- **Introductory comments:** Slide 17 presents an example of the business connector role in context with one of the common business cycles – hiring patterns. In this context, business services staff can proactively recommend connections (and services) based on needs at specific points in time, instead of waiting for an employer request.

  - **Describe the concept of “Peaks and Valleys” presented on the slide:** With LMI and job vacancy data, hiring cycle patterns may indicate peaks and valleys for high and low levels of activity respectively. (The chart in the slide illustrates a “generic” national hiring cycle during a stable economy. In this example, there are two distinct peaks and valleys.)

  - **Present bullets:** these tips primarily refer to service delivery, but the concept can be applied to the business connector role as well, as described in the following example.

  - **Prior to hiring peaks,** staff may want to send a newsletter out with information and connections to sources for answers to legal questions (interview questions, what references can/cannot say, etc.), EEO/Affirmative Action, and connections to LMI wage data for salary negotiations. During the “valleys,” staff may want to host expert-led
seminars on topics such as unemployment insurance, OSHA, workers’ compensation, Small Business Administration, etc.

- In summary, a good business service representative: has extensive business and resource connections; knows a wealth of information about other available services and how to obtain them; and, has learned which service providers have the highest customer satisfaction levels so that a “recommendation” is included with the referral.

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**Slide 18 Presentation Notes**

- Introductory comments: The role of business services provider is the most common, and perhaps the most important, for business services staff – from those with the title of business consultant to those that provide data entry for employer job listings. In order to increase the amount of time and resources available for the other three roles (consultant, champion and connector), some centers have organized along “functional” lines, with some staff more focused on providing the “external” roles (consultant, champion), and spending considerable time out of the Center in the business community. Regardless of the organizational structure, ensuring highest quality services are delivered to business customers is the shared responsibility of business services staff.

There are other sessions that focus on business services and service delivery (Module 2: Developing and Aligning Business Service with Demand, 4 sessions), but at this point, briefly discuss one of the main requirements for delivering relevant business services: the importance of knowing and staying current with recent changes in the business world. This and the next two slides present some of the dynamics and trends in one area of business that impacts workforce development services: recruitment and hiring practices.
State and ask for participant agreement that changes in recruitment and hiring practices continue at a fast pace. Add: "In fact, human resource professionals note this rapid change as one the top challenges they face."

Ask participants to think about what is causing or contributing to this rapid rate of change; what are the “drivers?” If in classroom/interactive session, process as a large group discussion and note responses on flip chart/white board. If on a webinar, pause, and then continue. Present the list of “drivers” on the slide, providing any relevant details/examples (i.e., those on the recorded webinar). Ask participants which “driver” they believe has the most significant impact (hold large group discussion or pause/continue). Then, inform participants that “technology, and lack of qualified applicants with the right skills” are the major drivers of change in business recruitment and hiring practices.

As a segue to the next slide, ask participants what they think are the biggest changes/trends in recruitment and hiring (large group discussion or pause/continue).

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Slide 19 Presentation Notes

- Introductory comments: The next session (1-2) details this topic, so for now let’s take a brief look at a list of “hot trends” in recruitment and hiring - or “buzzwords” as Recruiter.com calls them - that describe trends to watch in 2012. Ask to think about how these trends have or will impact your Center’s service delivery. (Additional detailed presentation notes on these trends are in session 1-2, slides 19, 20, 21).

- Review the article for a full discussion of these trends: [www.recruiter.com/i/2012-recruitment-what’s-behind-the-buzzwords](http://www.recruiter.com/i/2012-recruitment-what’s-behind-the-buzzwords). In summary:
- “Social” recruiting, or using social media and other social networking sites for recruitment, is one of the major changes in the hiring process. According to some of the latest surveys, 81% of employers use social media for some part of the process, with additional employers planning to start. (JobVite online survey, 2011)

- With advances in cell phone technology and the increase in use of “smart phones;” large numbers of employers and job seekers have video cameras “in their pockets.” This has led to an increase in use of video – for interviewing as an example – during the hiring process.

Infographics are computerized, visual, graphic representations of data and information. Infographics are rapidly spanning the internet, and showing up in recruitment/hiring practices. Refer to resume on the slide: this is an infographic resume, which in this case is perfect for this “graphic designer.”

- Examples of mobile communications’ impact include recruiters using Twitter to post jobs with followers, job boards “texting” alerts to job seekers when job matches are found based on automatic searches, job seekers carrying an electronic copy of their resume to edit and transmit 24/7, and more.

- Candidate engagement changes reflect employers’ understanding of how competitive the talent market can be; and thus, they are creating policies and practices to increase and improve communication with candidates throughout the process. “Personal brand” is the trend of job seekers creating an extensive, unique presence on the internet that appropriately packages them as a top candidate for whatever job they are seeking. Personal brand tools include social networking, YouTube, blogging, individual web site, and more.

- To respond to these and other trends, business services staff have to research and stay aware of changes, and focus on continuous improvement of delivery of business services.
**Slide 20 Presentation Notes**

- **Introductory comments:** Again, the next session - “Recruiting and Hiring has Changed” - details this topic; however, here are some highlights to consider in terms of impact on your Center’s recruitment and hiring services/processes.

- **Read the survey results** (from JobVite online social media survey conducted in 2010) listed on the slide. The first two bullets address trends; the third bullet associates social networking recruitment practices with **hiring outcomes**; and the last relates to the most common use of social media for recruiting/hiring: candidate research. This includes social media sites most used for research by employers.

- **Ask participants to think about what these trends mean to business services at their Center.** Use the second bullet as a prompt: “What does it mean to our services if increasing numbers of employers are going to use – and in fact prefer - employee referral networks as a method to recruit new workers?” Some participants may already know about the trends, and can be asked to share how his/her Center has responded. If in an interactive session, allow for large group discussion; if presenting a webinar, pause for a moment to reflect. To summarize, note that each of the trends has an impact. At a minimum, we need to learn about the trends; however staff can go over and above by becoming proficient in social recruiting, e.g., LinkedIn, learning to use it as a recruitment tool; helping employers design and develop employee referral networks; and, advising job seekers of this trend so they can join the sites and network for job opportunities online.
Slide 21 Presentation Notes

- Introductory comments: Slide 21 addresses a basic tool to use in the role of business services provider: a list of business services. For those that need to develop (or improve) a business services list, this slide illustrates several recommendations presented below.

- The term “business solutions” is recommended in place of “business services” to better imply a successful outcome rather than a mere “menu listing.”

- Note: Inform participants that the list is sorted by “categories” of service for the sake of length and space. For example, if you were to itemize all of the labor market information services, the list would be very lengthy; instead “Information Services” is listed, with commonly used services as examples.

- This list focuses on “services” and does not distinguish between individual “programs,” which could fall under multiple service categories. For example, “training programs” are included in three different categories: Skills Development, Worker Readiness Development and Retention Support (for career advancement training). When you review the details used as examples in those categories, you can see all of the different types of training programs available. This use of “services” gives you a better opportunity to be descriptive and clear about the various services being performed under a specific program. For example, “Workforce Investment Act Training,” which refers to both the legislation and the name of the program, is not as important to the business customer as the specific services, or solutions, being offered.

- In addition to listing “services,” it is recommended that you avoid government/bureaucratic language as well as uncommon acronyms that businesses will not know. Instead use simple, descriptive language preferably in the active rather than passive tense. If there is
a similar counterpart “private sector” term/word, consider using it. For example, “Recruitment Support” could be “Staffing Support” because “staffing” is the term used by most private sector placement agencies.

- This slide can be seen as a “template” for editing and customizing by a particular business services representative; however, it is essential that a list of services is developed and fully understood by staff working with businesses.

- Note that this slide concludes the discussion of the four primary roles recommended for business services staff. The last few sections cover ideas for organizing and working as a business services team; summarize common job responsibilities of business representatives, and provide additional resources for success in your various roles.

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**Slide 22 Presentation Notes**

- The next three slides are a brief opportunity to present ideas for organizing business services staff into teams; and/or improving team operations. Slide 22 is edited to reflect the organizational structure of your participants: describe the model (i.e., select from the five listed on the slide) and present relevant operational details.

- If you are presenting to a general audience that is considering reorganizing business services staff into a team, each of the five can be presented and described. Advance research on common business services staff organizational structures in use across your state/region may be beneficial in order to compare and contrast actual teams.

- Present segue to next slide: “Regardless of structure, business services teams have some basic requirements in order to be successful.”
Slide 23 Presentation Notes

- Introductory comments: This slide presents some guidelines for successful team operations in the left column, as well as some suggested/sample team activities in the right column.

- Review basic requirements for team success (left column). If in the classroom/interactive training session, ask participants to form teams and try to come up with additional items to add, while commenting or ranking which are most important guidelines on the list.

- Review sample activity list (right column). If in the classroom/interactive training session, ask participants to discuss important (one-time or ongoing) activities.
Slide 24 Presentation Notes

- This is an example of a system-wide team (#3 on slide 22), showing how 10 partner organizations assigned 36 staff members to be dedicated to this team. As indicated on the slide, the team holds weekly update meetings and coordinates service delivery for the list of services on the slide. (This is a team in current operation in Washington state.)

- Include this slide in your session if relevant to present ideas on how to “expand” your business services team, or increase to a “system-wide” team with coordination and collaboration across multiple partners in an area.
Slide 25 Presentation Notes

- The next three slides (25, 26 and 27) are a summarized list of ten key responsibilities for business services representatives. While the majority of the session is organized into recommending and illustrating the primary “roles” for business services staff, these slides are more like a job description, detailing key components of a local workforce development system that this job is responsible for.

- Ask for a discussion on the difference between roles and responsibilities. In summary, point out that “roles” are more generally understood as functions with expected types of behaviors and activities – more at the macro level of understanding how the business services staff function can best contribute to the workforce development system success and business success. “Responsibilities” are more specific and detailed in nature, and address areas that the staff is accountable for - less on how to do the job, and more about what impact and outcomes are expected.

- There is overlap between roles and responsibilities, in this session and in reality. This list can function as a checklist for comparison to your current job descriptions, or as a source document if you are looking for a “template” to use to build a job description and set of responsibilities.

- If your area has a job description for business services staff, insert the text from that document here, and review for clarification and comprehension. Otherwise proceed through a brief presentation of each of the responsibilities, adding any details or examples as illustrations of the responsibilities.
Ten Job Responsibilities of Business Representatives

5. Provide a single point of contact (person or process) for all business needs:
   ▪ Assess needs to develop customized packages of services.
   ▪ Create the package of services in a single business services proposal.
   ▪ Coordinate service delivery by linking businesses to all appropriate services/resources.
   ▪ Follow-up with partners and businesses to make sure promised services/resources were satisfactorily delivered.

6. Deliver direct program services.

7. Maintain frequent contact with key employers to meet emerging and changing needs to ensure ensure repeat usage of multiple one-stop services over a long period of time.

Ten Job Responsibilities of Business Representatives

8. Provide timely labor market information.

9. Act as a human resource consultant – especially for small to mid-sized companies:
   ▪ Show businesses how to effectively hire, train, re-train, and retain workers.
   ▪ Offer expertise the business doesn’t have (e.g., training).
   ▪ Share and customizing labor market information.
   ▪ Present options and service linkages to help solve specific workplace problems.
   ▪ Help businesses assess information and resources.

10. Have an understanding of local business needs:
    ▪ Know what local labor market information means for business.
    ▪ Understand each of the major industry clusters.
    ▪ Understand the local business problems and offer solutions.
    ▪ Know which businesses are hiring or downsizing.

Slides 26, 27 Presentation Notes

- Proceed through a brief presentation of each of the responsibilities, adding any details or examples as illustrations of the responsibilities.
Slide 28 Presentation Notes

- The Business Services Leadership website – a section of workforce3one.org - is presented as a resource for sharing “community of practice” information, ideas and connections. As with all websites featured in your training session, be sure to visit the site and explore each of the navigation/menu options so that you can describe the benefits and features of the site to participants.

- This site includes: LMI learning resources, business engagement information, service delivery ideas and practices, and sections on measuring results, social media and additional resources. This is the site where the podcast on LMI is found – as promoted earlier in this session (on slide #10).

In addition, one of the features is a link to a dedicated LinkedIn group for business services representatives from around the country, along with other resource people/members. (This is indicated by a red arrow and red circle around the link.) Encourage business services staff to join this group to network with colleagues from across the country.
Slide 29 Presentation Notes

- This is a content overview of the 13 sessions in the Business Services Training Project. Note: the above slide (as it appeared in the first webinar) does not reflect the actual titles used for the training series. They are listed below. (These are the titles that appear on the title slide of each session, in numerical order by module and session.) A version of this slide may be presented as an introduction to the full series if you intend to deliver each of the sessions. Otherwise, edit the sequence to reflect the order and number of sessions planned for training.

The 13 training sessions are divided into four modules and include:

**Ten sessions, delivered and recorded as webinars**

1. **Clarifying the Roles and Responsibilities for Business Services Staff**
   - 1.2 Four Primary Roles for Business Services Staff
   - 1.2 Recruiting and Hiring Has Changed
   - 1.3 Building Relationships with the Business Community

2. **Developing and Aligning Services with Demand**
   - 2.1 (Re)Defining Business Services Based on Business Needs
   - 2.2 Aligning Services with Business Needs: Aligning Job-Seeker Services with Current Recruitment Methods
   - 2.3 Process and Service Improvements for Job-Seekers to Ensure Quality Referrals
   - 2.4 Collecting Information and Ensuring Business Satisfaction

3. **Marketing and Outreach Strategies**
   - 3.1 Strategic Marketing to Business Customers
   - 3.2 Target Marketing and Business Account Management Strategies
3.3. Outreach to Businesses: Tips, Tools and Tactics

*Three training templates,* not delivered as webinars

4. Demand-driven Workforce Development

4.1 Understanding the Current Economy and Business Market to Develop Targeted Industries or Sectors (based on state/local LMI)

4.2 Identifying Current Workforce Development Challenges in Targeted Sectors for Development of Service Delivery Solutions

4.4 Demand-driven Alignment: Strategize and Plan for Success

*These sessions are described as templates and were not delivered as webinars because the content is designed to specifically relate to a state, region or local area. As templates they require a significant amount of editing. The relevant facilitator’s guides include instructions to convert the templates into training presentations.*
Slide 30 Presentation Notes

- The final slide introduces a "Q&A" section of the session; however, creating this as a specific section of the training should only be necessary if you conduct an online webinar, where the number of participants might limit dialog during the presentation. Otherwise, relevant questions and other dialog should be included throughout the training. The Q&A process and method is determined by the technology/program you are using. A Q&A pod or chat box may be used for participants to pose questions, or the facilitator may un-mute telephones on a conference line for group discussion.

- In addition, the title, date and time schedule for your next webinar/training session is posted.

- Also, information on the presenter, sponsor or other organizations involved may be inserted here.