

On-the-job training checklists improve efficiency

By: TROY BRADY
Sr. Training and Procedure Consultant
ABS Consulting

The most widely used method of training is known by many names. Demonstration, skill assessment, job performance, proficiency testing and on-the-job (OJT) are just a few names associated with training in the field. Regardless of the name chosen, OJT as commonly practiced has some common characteristics, including 1) The location of training is the actual work site, 2) An experienced employee teaches the new hire and 3) The training is provided from memory.

The problem with training from memory is that points are sometimes forgotten and each trainer uses his own experience to train. Therefore, training is inconsistent. What is needed is some type of guideline for OJT training.

One of the easiest guidelines is the OJT checklist. With this single document, ABS Consulting has a structured guide to OJT as well as a documented record of task qualification. This makes the OJT checklist an integral part of the overall training process. Some of the

things that we expect the OJT checklist to provide are: 1) Set objectives with a performance standard, 2) An outlined plan, 3) The opportunity to discuss, demonstrate and practice and 4) Objectively evaluate unsupervised performance of the objective.

OJT application

So what goes into the OJT checklist? Instructional System Design (ISD) is a training methodology that ties training to job tasks. Briefly, the job is identified, tasks of the job are listed, tasks are chosen for OJT, and OJT checklists support the identified tasks.

OJT methodology

Below is an OJT methodology that will ensure that the OJT checklists are used correctly. There are six steps for conducting OJT:

➤ Step 1: Trainer Review — Trainer should review the OJT checklist to refresh on task requirements.

➤ Step 2: Trainee Briefing — Steps 1-4 are the training phase of OJT. During this briefing, discuss and explain the task to be

performed, identify the equipment and procedures to be used, review special precautions and difficult steps, and explain what the acceptance criteria will be.

➤ Step 3: Trainer Demonstration — First, the trainer demonstrates task performance. For complex tasks, the trainer may demonstrate the steps several times before allowing the trainee to attempt them. Demonstration should continue until the trainee agrees that they can perform the task.

➤ Step 4: Trainee Supervised Practice — As the trainee begins the task, the trainer observes and follows each step on the OJT checklist. Continue the practice until both the trainer and trainee are confident. Make sure that the trainee realizes that the training phase will stop only when they are ready for the evaluation.

➤ Step 5: Task Evaluation — At this step, training stops and evaluation begins. Now it is important to clearly communicate that the training portion of the OJT process is over and the evaluation phase will begin. As the trainer evaluates the trainee, he follows each observable step on the OJT checklist and evaluates observed

performance to the acceptance criteria.

➤ Step 6: Debriefing and Documentation — If successful, the trainee and trainer sign the OJT checklist, and this document becomes part of the training record. At this time, the trainer generally provides positive feedback and points out specific improvements. Also, this is a good time to indicate the path forward such as the next OJT checklist(s) to be completed.

Unsuccessful performance is critiqued with specific feedback where problems started to occur. Usually, unsuccessful performance is not documented; however, this is determined by the training policy. Regardless, the training resumes at Step 3, Trainer Demonstration. The process continues until the trainee can perform the task.

Using structured OJT training greatly improves training efficiency and consistency of operations. It is easy to develop OJT checklists, and the benefits are well worth the effort.

For more information, contact Troy Brady at tbrady@absconsulting.com or by phone at (281) 584-9214. □

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400 N. Richey Street, Pasadena, TX 77506 • Contact Brad Rountree
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