

How To: Create a Cross-Training Action Plan

Resource Type: Articles

Topic: HR Risk and Employment Practices

Cross-training is an essential risk management function. It ensures someone in your organization can perform key tasks if the person who usually handles them is out of the office or unavailable for any reason. But cross-training has other benefits too: it can offer employees new challenges, help reduce staff turnover, and break down silos in an organization. Use the table and the tips below to create a unique cross-training plan for your nonprofit.

Find Out Where You Need to Cross-Train

Figure out which tasks of each job function in your organization need a backup (i.e., they are essential and someone else in the organization would need to do them immediately in the absence of this employee). Ask employees to identify their top 10 critical tasks and responsibilities, and complete a grid showing which team members have been trained to handle the task during an unplanned absence. Convene your team to share and discuss the draft grids. Here's a sample cross-training grid to get you started.

Critical Task	Back-up staff or contractors trained to do this and prepared to step in	Plan to fill any gaps, including deadlines
<i>Example: review contracts submitted by the program team before execution; focus on key provisions such as indemnification, scope of work, and insurance requirements</i>	<i>Example: 1st backup – Senior Accountant; 2nd backup – External legal counsel</i>	<i>Example: Deliver a contract review workshop to at least 2 members of the Executive Team by 12/31</i>

Build Your Cross-Training Approach

- Once you have your grids, and a sense of where you need to train, consider how your cross-training plan can best serve your nonprofit's major goals. Do you need to prepare for unexpected absences, to support staff development, to reduce disruptions when staff are taking vacation, sick leave or PTO, etc.?
- Determine which tasks most urgently need a backup now, and which you could schedule training on later.
- What interests have employees expressed in learning skills and tasks of a job function other than their own? Match job functions with employees interested in learning them.
- Figure out how long might it take an employee to learn each job function.
- Ascertain whether a written list of steps to perform the tasks of job functions exists. If not, can you create one as part of cross-training?
- Determine what incentives you can give employees to cross-train on new skills (bonuses, time off, etc.)
- Figure out how you will give employees time and resources to cross-train their peers and to learn new skills.
- Decide how you will gather and implement employee feedback on your cross-training efforts.
- Make sure you have a plan for how your nonprofit's leaders will model the behavior you seek. What will leaders cross-train on?

Refine Your Plan

As you begin cross-training, note wins and challenges. Adapt your plan as you go. A plan that works well for one stage in your nonprofit's growth may require major changes as the organization transforms. But if you have key tasks covered no matter what happens, you'll be ready to tackle change.

Additional Resources

- [Cross-Training Employees – liveabout.com](#)
- [Cross Training: Succession Planning That Also Boosts Engagement – HR Dive](#)
- [Cross-Training Employees: 7 Effective Tips to Get Started – Indeed](#)