

# Training 101

## C R E A T I V E T R A I N I N G M E T H O D S

Lectures, role plays, training manuals, interactive video, simulations, computer-based training, audiotapes, job aids. Sometimes, it may seem that there are almost as many training methods as there are trainers. How do you choose the best techniques for getting across the information your trainees need to know?

Sometimes, says Citibank training specialist Sophie Liebman, busy trainers get stuck in a rut, always using the same two or three training methods. Liebman's creative "3-5-3" approach, described below, is a simple, three-step method for developing a wider variety of training options to choose from.

One option that many trainers use is role play. Unfortunately, it's an option that many trainees hate. In "Oh No...Not Role Play Again!" Sandra Balli of the University of Missouri provides tips for making role-play exercises more useful, more relevant, and more enjoyable for trainees.

### The 3-5-3 Approach to Creative Training Choices

*By Sophie Liebman, training specialist for New York Marketplace for Citibank. Reach her at 40 Clinton Street, Suite 4C, Brooklyn, NY 11201; 212/620-1544.*

We all know that creativity in training is good. Creative choices of instructional strategies lead to more engaging and more memorable programs, provide fresh ideas for dealing with limited resources or finances, and enhance an organization's reputation for being innovative. But creativity is not inherent in every training designer's or instructor's repertoire, particularly



Illustration by Seth Jabben

in a high-pressure environment.

When you need to unleash your creative potential, try the 3-5-3 Approach to creativity for trainers.

The 3-5-3 Approach is actually quite simple. It is a model you can use to create and consider options beyond your usual thinking about instructional strategies and methods.

To see how the technique works, let's look at the example of training offered to telephone operators in a large company. The goal of the training is to teach operators to route incoming telephone calls. We'll trace the choice of instructional strategies through the steps—3, 5, and 3—to see how the approach works. First, pick out a particular training issue or problem. Now, with that issue or problem in mind, go through the 3-5-3 Approach:

**Describe the first THREE training methods or instructional strategies that come to mind; then disregard them.** The first three training methods I looked at for the call-routing

*With this new approach to choosing training methods, one winning idea leads to many others.*

program were lectures, role plays, and games.

Traditionally the company had accomplished training related to the phone system through short lectures in which an instructor introduced the technical aspects of the system as well as the company's rules about using it. Role playing had also been extensively used to provide participants with an opportunity to practice new skills, such as phone routing, in a safe atmosphere. In recent efforts to make training more fun, games had also become common. My first thoughts were formed along these familiar lines.

In the box, the first bulleted list shows how I described each of my first three ideas for delivering the training to the telephone operators.

Two rules that apply to the 3-5-3 Approach:

- ▶ All of the methods you consider have to be realistic. In other words, "pie-in-the-sky" approaches that you could do "if only..." are not valid. Consider only methods that you can actually use, taking into account your budget, resources, and interests.
- ▶ All of the methods have to be developed. Describe each of them in some detail; don't just note them. Determining how an activity would play out is helpful because some methods that sound workable in theory may not be—also, while developing one method, you might come up with another one.

In my example, after I listed and described my first three methods, I discarded them, as the model suggests. Why did I get rid of good ideas? Isn't that a waste of valuable time? No, it is not a waste at all. The first three ideas that come to a person's mind are not, in general, the most creative. These are, for the most part, old stand-bys, the methods we use over and over again. So, trainers should go through their usual thought process to come up with three ideas but should then go beyond them and think of five more.

**Describe FIVE additional methods of delivery.** Why so many? Why create a total of eight methods, when in the end only one will be used? Because sometimes you need to develop six ideas before you hit on one that's

## WHY CREATE EIGHT METHODS, WHEN ONLY ONE WILL BE USED?

good enough to use. Also, if during the process you consider several methods, you are less likely to censor your ideas up front, and more ideas will eventually result. Trainers who save their notes on all of the ideas they generate can create a storehouse of methods for future use.

In the box, I've described five additional approaches I came up with for training telephone operators to properly route calls: simulations, relay races, an audiotape with discussion groups, guided imagery, and a job aid. The financial and time requirements of these five additional ideas are no more burdensome than those of my three original thoughts. The difference between these five ideas and the three from the first step is that these five ideas are new.

**Take at least one previously generated method and describe THREE ways to structure it.** The final step in the 3-5-3 Approach is to select one method (or a few) and to develop

### The 3-5-3 Approach to Creative Training Methods

#### The Training Issue: Proper Routing of Phone Calls

**3** Describe the first three training methods or instructional strategies that come to mind; then disregard them. Here are the three I came up with first for the telephone call-routing training:

**1. Lectures.** The instructor presents participants with company phone-routing policies.

**2. Role plays.** Participants could work in triads (one takes the role of a caller, one of a telephone operator, and one an observer), using real-life case scenarios.

**3. Games.** For example, participants receive packs of cards, one for each department in the company. The object is to get rid of all your cards. Player 1 draws a situation card and decides in that situation whom to pass the call to; a player who answers correctly can discard the card. All players continue in the same way until someone runs out of cards.

**5** Describe five additional methods of training delivery. In the example of the training in call routing for telephone operators, I described the following five strategies:

**1. Simulations.** For example, turn the training room into the telephone operator's office and run through a typical half hour; then evaluate the performance.

**2. Relay races.** The class could be divided into two teams. Each team would have four sheets of paper, with six blank lines and a department name on each. A team member pulls a situation card, figures out which department the call would be routed to, and lists the card number on the sheet of paper for the correct department; then the next team member takes a turn. The first team to complete all four sheets correctly wins.

**3. Audiotapes.** Play a tape of callers who get routed to the wrong departments, who get cut off, who get frustrated, or who have other problems with phone interactions with the company. Hold discussions of what the operators could have done better.

**4. Guided imagery.** Talk participants through a scenario in which routing decisions are made. Continue guiding the experience, based on the decisions they make.

**5. Job aids.** Eliminate classroom training and distribute a clear, self-explanatory job aid instead. For instance, create a tabbed booklet. Tabs list what the caller might say.

three possibilities of how to use it (or them).

In the chart, I've further developed the idea of using either a job aid or a game. For each of these two methods, I've outlined three examples. In doing so, I've created a game that I was happier with than the game that came to mind in the preliminary step.

The Bingo game asks participants to block off the correct department to which a particular call would be routed, until they have blocked out a straight line in any direction. That seems like a better option than the game in which players must get rid of all of their departmental cards as somebody reads off situations that

warrant a call being forwarded. Bingo is more recognizable to participants, and the rules are simpler. But I would never have thought of a Bingo game if I had stopped thinking about games after envisioning the first one.

And that is the entire 3-5-3 Approach—Come up with three strategies to address your training need and disregard them. Brainstorm five additional strategies. Finally, select one of the strategies and provide three examples of how you might use it.

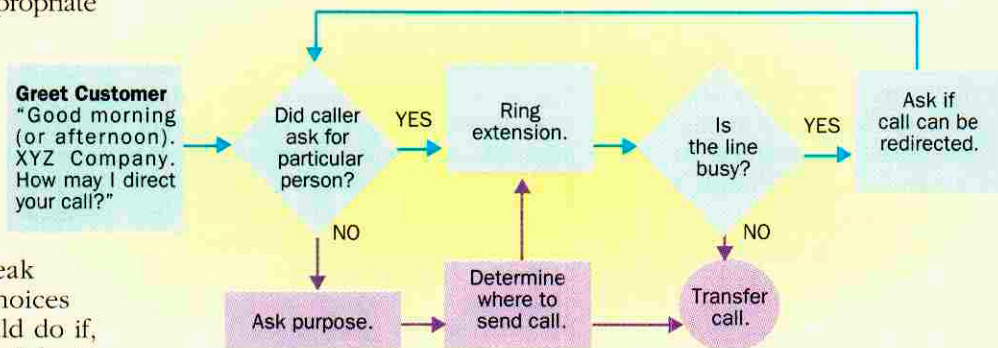
At first, the three-step approach might take some time. But as it becomes more natural, it can actually save you time previously spent

developing ideas that didn't work or that weren't compelling enough, in the end.

You might find that you can save resources that might have been wasted testing out one idea that eventually led to another. More experienced trainers may even be able to eliminate the actual development of the first three ideas, if the information that is generated during this phase is not leading to additional methods.

The final result of using the 3-5-3 Approach to creativity for trainers can be an intervention that is exciting, that leaves a long-lasting impression, and that is the best use of your resources and time.

Tabs list what the caller might say. The operator flips to the appropriate tabbed page and sees a list of options or directions, such as "I want a job with your company," "I have a complaint about your product," "I want to order a product," or "May I speak to...." Under a request such as "May I speak to...." the card could list choices for what the operator should do if, say, the person being asked for is out of the office.



**3** Take at least one previously generated method and describe three ways to structure it. For the telephone operators' training, I looked at the last of my five options in the second step (job aids) and the last of the three options in the first step (games).

First, the job aid. My job aid suggestion in that step was a tabbed booklet for easy reference while taking calls. In this step, I've come up with three other ways to structure a job aid.

**1. The placemat.** On a "placemat," list the company's departments and the calls appropriate to route to each one. For example, under Customer Service, you could list "complaints" and "information." Under Purchasing, you could list

"vendors" and "inventory inquiries."

**2. The personal job-aid option.** Provide instruction so that participants can create their own job aids.

**3. The flowchart.** Provide a flowchart of the operator's decision process. (See the sample flowchart)

Now, let's look at games. During the first step, I came up with an idea for a game in which participants each have a pack of cards that list different departments in the company. Participants discarded cards as they answered questions correctly about routing calls to those departments. Now, I've had to come up with three other options for games to train the telephone operators in the proper routing of calls.

Here are my three:

**1. Jeopardy!** Questions are grouped into categories of types of calls. Answers (in the form of questions) are the various departments to

which the operators should route the incoming telephone calls, or the responses the operators should make to the calls.

**2. Bingo.** Players receive Bingo game cards with different combinations of departments on them. They also receive poker chips. The trainer reads out incoming-call scenarios. Participants block the squares with the department to which operators should refer the caller. The first participant to block out five in a row is the winner.

**3. The maze.** Create a pencil-and-paper maze with a situation listed at the top. Participants who follow the maze to the appropriate department, following each step in the correct sequence, will easily reach the end of the maze. Participants who go to the wrong departments in the wrong order will run into a dead end.

## Oh No...Not Role Play Again!

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The young woman approached me assertively. I hardly noticed her at first; I was intent on adjusting the overhead projector for a seminar I was about to teach. She was small and slender, with a non-nonsense look that belied her delicate appearance. Other participants were quietly taking seats, but I sensed that she had something to tell me.

"I just wanted you to know," she said, "that if you do any role playing, I'm probably going to walk out." I was curious about her obvious distaste for role play, but time was short. So I decided to resist asking questions. Instead, I assured her that role play was not part of the day's activities. With a quick smile and a satisfied nod, she walked off and took a seat near the back of the room.

**Mixed reactions.** A negative reaction to the idea of role play is not unusual. Role play puts class participants "on stage" to dramatize a variety of human-relations, problem-solving, or skill-developing situations. At its best, role play elicits new insights and skills. At its worst, role play can be an uncomfortable, unfocused exercise.

After the fact, role-play activities often receive mixed reviews.

For example, I analyzed telephone surveys that were conducted with 184 employees after they had attended company training sessions taught by a variety of instructors. In the survey, we asked participants to discuss openly what they liked most and least about the training. About a third of the participants chose to discuss role play. Half of this group reported that role play was the best part of the training. The other half said they liked role play the least, calling it "ridiculous," "restrictive," "overdone," "not real-world," and "too open-ended."

Role play can be a rich interactive teaching and learning strategy—if instructors make the experience

more appealing for all class participants. Instructors who simply toss out a role-play situation and persuade a few participants to act it out are not likely to experience successful outcomes. Successful role play that is enjoyable and relevant for participants takes careful planning, preparation for both role players and observers, and a meaningful post-enactment discussion.

**Prepare the audience.** It takes time for seminar participants to warm up to the instructor and to each other. Even if participants already know each other (and especially if they don't), participants come to a new seminar with a variety of hidden concerns.

For example, participants may wonder how well they fit in with the rest of the group. Will their ideas meet with approval? Early on, they may cautiously explore the boundaries of group acceptance. It is up to the instructor to move participants beyond their concerns by creating an atmosphere of warmth and inclusion. If the class explores differing views without reprisal, participants will be more willing to share and confide.

When the group achieves a sense of cohesion, the idea of role play can be introduced. Provide plenty of advance notice. For example, just before a break, suggest that when the group reconvenes, it will be involved in activities. Mention several issues that have surfaced and suggest role play for exploring the issues. Indicate that some people may want to be part of the actual dramatization, while others will be actively involved in observer tasks. No one should feel left out or unduly pressured to participate.

**Select and prepare the role players.** Begin to ease participants into a mood for role play. Set the stage by introducing a specific situation to be enacted. Identify a simple line of action to provide some structure, but be careful not to over-engineer the activity. To help participants visualize the situation, ask them to describe potential characters—discussing, for example, what they are like, what they might be doing, and how they might feel.

After the group has thoughtfully developed the scene and the charac-

ters, ask for volunteers who would like to play particular roles. If group members seem hesitant to volunteer, pause so that the group can think about the roles. While the group is contemplating, you can write short character descriptions on a flipchart.

Participants sometimes volunteer someone else for a role, rather than themselves. Don't use persuasion to assign a role to a reluctant person who has been suggested for it. Find a person who is willing. As the instructor, you might consider playing a role yourself, so that participants recognize that you are willing to take risks, too. Your willingness will serve as a catalyst for others to volunteer.

When volunteers have been designated for particular roles, help them determine what they are trying to accomplish. Specifically, make sure everyone understands the focus of the enactment (for example, a problem to solve, a situation to handle, or a skill to develop). The focus will govern the nature of the post-enactment discussion.

**Prepare the observers.** While the role players are planning their character parts, tell those who will observe that their task is important, too.

Assign specific tasks to the observers before the enactment. For example, you could assign some observers to determine the effectiveness of a role player's behavior. Ask some to evaluate the reality of the enactment. Ask some to observe role-play actions that helped or hindered the situation being enacted. Designate others to suggest alternate ways of enacting the situation.

This allows the entire group to experience the enactment and better analyze the activity afterward. Suggest that observers jot down notes during the enactment to help them in the discussion afterward.

**Enact the role play.** Since role players are not using a prepared script, a role-play enactment is not expected to be a smooth dramatization. At times, role players will not know how to respond. This is why it is important to set the stage and establish a focus up front. If you, as the instructor, have played a role, you may be better able to guide the role-play enactment to meet your

objectives for the learners.

Keep the enactment short. Allow it to continue only until role players have practiced the skill, expressed the idea, developed a character, or reached an impasse. Then, suggest that the group break the action so people can begin to clarify and discuss what has transpired. And when role players have completed the enactment, make sure they feel appreciated for their efforts.

**Discuss the enactment.** At this point, find out what the observers and role players have learned. They may begin discussing the enacted situation automatically, especially if they view it as important and relevant.

The discussion will probably wander in different directions. Initially, so many ideas may emerge that it will be tempting to consider each one only superficially. To avoid too much random discussion, periodically refer to the focus you stated up front.

Always be sure that your questions and comments encourage the free and honest expression of ideas. Accept suggestions without making value judgments, to help participants explore various sides of the issue. Recognize and contrast alternative points of view. Be reflective and supportive. Paraphrase and summarize responses. Record the summary of ideas as bullet points on a flipchart.

**It doesn't just happen.** Role play is a versatile teaching model, applicable to a variety of educational objectives—including understanding one's own or another's behavior, acquiring new options for handling difficult situations, and improving specific skills. But successful role play doesn't just happen.

Planned and carried out with care, role play can bring realism to concepts that have been learned in a more didactic way. It can also be a good technique for encouraging class camaraderie, informally measuring participant understanding, and stimulating trainees' interest in further inquiry.

**"Training 101"** is edited by **Catherine M. Petrini**. Send your short articles for consideration to "Training 101," Training & Development, 1640 King Street, Box 1443, Alexandria, VA 22313-2043.

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