

Making the Strange Familiar

Every now and then, it's a good idea to get back to the basics. That's true no matter where you are in your career.

Here are a pair of articles to help you focus on your trainees' basic needs.

The first deals with training for new employees. For them, everything about the job is unfamiliar—not just the work, but the surroundings, the co-workers, and the company's policies and procedures. The article draws on examples from the financial services industry to come up with some ideas for making a new employee feel more a part of things, so that he or she can get down to work more quickly, more happily, and more effectively.

The second article is a list of basic tips for any training program, to help you turn unfamiliar information into business-as-usual for trainees.

Three Simple Principles

By Kathleen A. O'Halloran, vice-president for administration at *Prototype Solutions, 1 Financial Center, Boston, MA 02111*.

I have three favorite truths about human beings and training:

- People are the same all over the world.
- People learn by doing.
- Learning can be fun.

They are simple principles, but they guide a lot of what is happening (or should be happening) in training courses. They are especially important to remember when training new employees. New hires are likely to be intimidated by a new company. Along with new jobs, they're dealing with unfamiliar people, policies, and procedures. Trainers can make the transition easier by empathizing with their position and by providing them with opportunities for active learning that is fun.

People are the same all over

Why is that an important principle for trainers? Of course there are

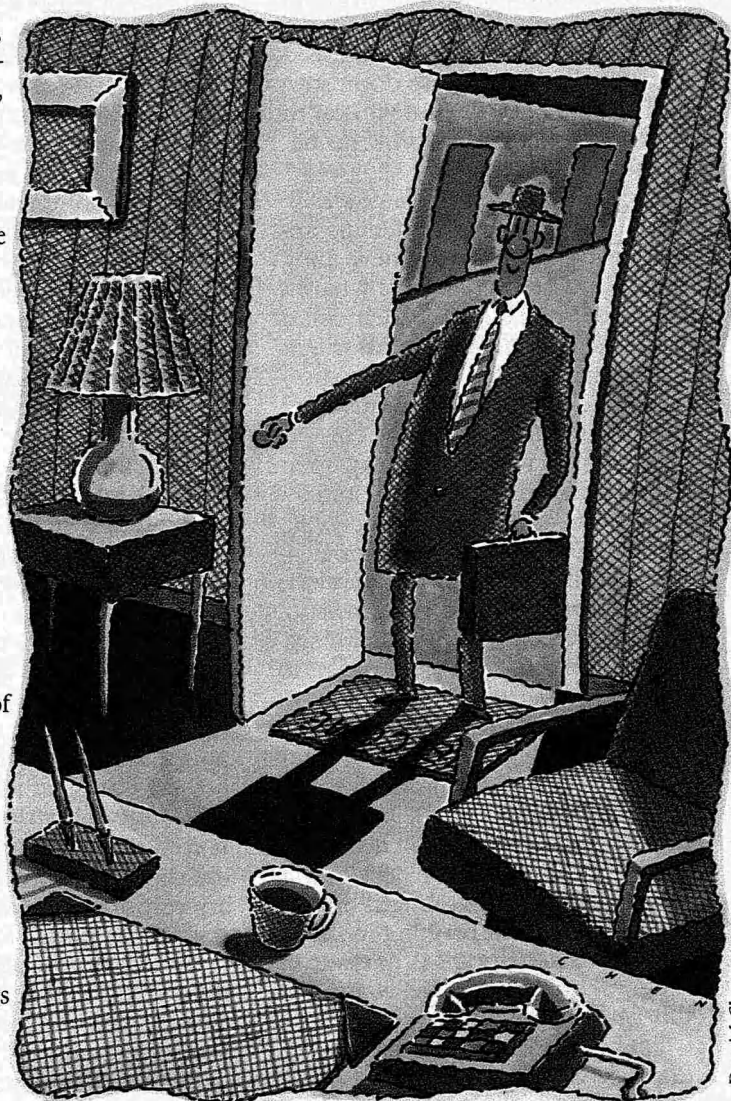
social, economic, political, and religious differences, but the people who sit before you as your trainees have many of the same needs, fears, and feelings as you have.

Try this exercise. Think back to the best class or the best teacher you've ever had. Jot down three things that made that class or teacher memorable for you. Your trainees share many of your needs as a learner. They are likely to find valuable the same traits that you've appreciated in past courses.

Ask yourself: "How many of these three things do I incorporate into my own classes?" If you already do all of them, list three more qualities of that unforgettable teacher.

When you have a list, set yourself a goal of incorporating those things into your own classes. If you think that doing so will entail a massive overhaul of your teaching style—or that it simply can't be done—choose just one. For the next month or the next quarter, concentrate on adding that one quality to your own classes. When that has become part of your strategy, begin to work on the next quality, and then the next.

People need to feel acknowledged. Host a class as you would a party in your home. Stand at the door of the classroom and greet each person, by name if you know it. If you don't know people's names, introduce yourself and ask them who



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they are. Unless they are wanted by the FBI, people love to be known and won't mind telling you. At the end of the class, thank them for coming. Go back to the door, so that people have to pass you on the way out. After all, you'd like to be acknowledged too.

People also need reassurance, especially when they're feeling apprehensive about trying new things. A good trainer remembers what it feels like to be a novice. Remember your first driving lesson? Your first tennis lesson? The first time you filled out your own tax return?

If you are training a new employee on her or his first day, spend a little time on small talk. Some human resource departments will furnish you with a resume, or a brief outline of a new employee's background. Use such materials to choose a benign, noncontroversial point of interest: "Oh, you went to Niagara University. . . I visit the Shaw Festival at Niagara-on-the-Lake each summer."

If that kind of small talk doesn't seem appropriate, you can talk to new employees about their commutes, about the best places in the neighborhood to eat lunch, or about convenient banking locations in the area. The point is to make them aware that you are aware that this is new for them.

Let people know you are glad that they are there. Sometimes that's as simple as saying, "I'm glad that you're here." I once had a trainer who failed to do this with the department managers who would call her to line up training programs. Time and time again, she communicated the attitude that such requests were enormous impositions on the training department.

I took her aside and explained what I had observed. I asked her to do "self-talk" before she said a word to the next person who called to request her services. I told her to remind herself that "these people are our clients; they are our reason for being."

You should be glad to be of service to your trainees or to the departments who are your clients. Make sure they know that. If you do, people will want to be near

you. They will come to trust you and they will learn from you.

People learn by doing

How did you learn to change a flat tire? Thread a film projector? Use a PC? You may have had a live demonstration or followed detailed instructions complete with pictures. But chances are, the skill didn't become yours until you had performed the task yourself. Yes, it was probably done imperfectly or with faltering steps; you trusted in yourself enough to know that the next time, you would do it better and more easily.

Many job-specific skills defy diagrams, demos, and videos. Nothing except for performing such tasks can give a trainee that sense of "now I know how to do it."

Making It Real

In my industry, financial services, skills training must meet two requirements:

- It must be authentic so that trainees can see what it's like to set up accounts and perform transactions.
- It must be "protected" so that the organization upholds its fiduciary responsibility toward shareholders and clients.

How do you make training authentic without compromising your responsibilities to your customers? Some suggestions:

Get a test system. A test version of your production system will give you the authenticity that is invaluable to trainees. It will also give you output so that you and the trainees can see what they did.

Let's say you are conducting systems training for bank employees. If you have information about your trainees before you meet them, you can set up accounts for them in your test system. Throw money into their accounts—a lot of it. Nothing pleases trainees more than finding out that they're millionaires, even if it's only pretend.

Use real source documents to make the training relevant. If you cannot borrow a batch of originals for classroom use, use "yesterday's work" and photocopy it. The time investment for the trainer is great, but the effectiveness of using actual

source documents gives a good return on your investment. Begin a library of photocopies and have them either mixed as a sample of a "day's work," or sorted by task, depending on whom you're teaching.

Take advantage of your participant mix. At times, you may have an "ideal pair" of trainees. For example, in a mutual fund operation, an ideal pair would be a data entry person and a quality control person. Have the new quality control person go over the work of the new data entry person. That not only teaches them both how to do their work, but also enables them to see the impact of one department's work on another.

Listening In

Simulating phone calls is an effective way of training new client services representatives. Before our phone reps handle client calls, they participate in a telephone skills workshop that requires no background in financial services. The program consists largely of role-plays and interactive videos. It teaches basic telephone skills and allows skill practice through both written exercises and case studies.

Training setups for phone representatives differ widely from company to company, but we have found great success with a phone monitoring system. For the first few weeks of the training, new client services reps spend half of each day in the classroom and the other half paired with experienced client service reps. Each trainee uses a monitor phone to listen in on his or her "training buddy's" calls. The "listener" can hear, but cannot be heard.

At some point, the trainee progresses to working the system's keyboard while listening in on the monitor phone. Then, in the third stage of training, the trainee speaks with the client and works the keyboard, while the experienced rep listens in on the monitor in case the trainee needs help.

Reading the Customer

When clients call or write to your company, they may not know how to ask for what they want. Financial services customers may not know an exchange from a transfer, or a

stock power from a signature guarantee. It would be unreasonable for us to expect them to. Client services trainees need to learn not only the "stuff" of what the company does, but also how to interpret communications from customers.

For example, a new mailsorter had progressed through the first week of training. Various transactions had been thoroughly defined for him and he had been drilled in them. He was extremely cooperative and attentive during class, so I was shocked to receive feedback from his training buddy that, once back in his department and faced with a stack of mail, he couldn't sort it.

When I poured over the stack of mail, it became clear why the new mailsorter was having difficulty. He may well have known the definitions of purchases, transfers, exchanges, and other transactions, but many of the shareholders' letters don't use those terms.

When a shareholder writes to us, she or he tells of a recent marriage, the demise of a spouse, or a new condo. We also get what the mailsorter thought was hate mail, telling us that a person is sick of XYZ fund and wants to switch to something better. We needed to establish a connection in the mailsorter's mind between "this is what you will see" and "this is the transaction that is being requested."

The incident reinforced for us as trainers the facts that people learn by doing and that textbook learning must be accompanied by application of that knowledge to the task at hand. We remedied the situation by creating an exercise that uses excerpts from real mail. In it, we ask trainees to label each excerpt with the appropriate transaction.

Learning From Experience

Trainees are not coming to you as blank slates. They may not have any background in your industry. They may not have even had real jobs before. But chances are, they have some life experiences that you can build on.

For example, in the mutual fund world, you could explain capital appreciation as an investment ob-

jective by relating it to homeowners who purchased their house for \$16,000 in the 1950s and now discover it to be worth \$259,000. You could explain escrow shares held against a letter of intent by describing renters whose security deposit on their apartment is being held in escrow to ensure that they uphold their end of a lease.

Samuel Johnson in his allegory *Rasselas* defines the task of the poet as one who "makes the familiar strange and the strange familiar." As trainers, our job is to make the strange familiar for our students.

It requires ingenuity and a little imagination, but for teacher and student alike, it makes learning fun.

Learning can be fun

We live in a society in which people pursue the trivial, put themselves in double jeopardy, and spin the wheel for an evening's entertainment. People like to compete. They like prizes. Why not take advantage of that sense of energy and enthusiasm in the learning process?

Our trainees play a game to learn the fundamentals of mutual funds. On the first day of the training, each participant receives a blank "play check." We ask the trainees to pretend that they have just come into an amount of what we call "discretionary income." They can choose any amount they wish.

Trainees all make their checks payable to a particular fund. They pool their resources together by dropping their checks into a vinyl "portfolio" entrusted to the portfolio manager, who may be a trainer or a trainee.

When the assets have been counted, the portfolio manager determines what securities will be purchased by the money in the fund. This game can be as elaborate as you wish; you may have the trainees fill out applications and set up accounts for themselves to reflect their purchases. If you go that far, you may even present them with dummy "certificates."

As classes progress, you could devise a Wheel of Funds. We actually had a carpenter make a roulette wheel. We can use cardboard inserts to quiz participants at any

stage of the game. For fun, you could include a wild card, at which the student attempts to stump the trainer.

A Boston-based mutual fund company recently opened a client services division in Denver, Colorado. The company brought in a new staff of relatively young, fun-loving client services reps. What better way to compete with your colleagues than to run a "Family Feud"? The vice-president of the division was the emcee and the game was a great success.

You can continue the fun through the end of the training. Award trainees by giving them parchment diplomas with their names in calligraphy. More awards—and more fun—await them as they move on to your follow-up training course.

More than good technicians

What makes a good trainer?

- someone who can take complicated material and break it down into a logical, learnable progression
- someone who makes people feel good about themselves and their capacity to learn
- someone who affirms the humanity of others, who will support others as they try new skills, and who will strive to make the learning experience enjoyable.

Trainers who can do all that can keep themselves fresh, nurtured, and growing.

Training Tips

By Marybeth K. Saunders, president of Training and Development Concepts, Inc., Box 11450, Norfolk, VA 23517-0450.

You're scheduled to train and you want to do well.

You practice and plan and then rest for a spell.

Whether novice or senior, to avoid any slips,

Review these wise words for some good TRAINING TIPS.

Timing is everything. Begin on time. End on time. Keep to scheduled breaks. Sticking to your plan tells participants that you are mindful of your commitment to them and shows them that you respect their schedules and priorities.

Also be sure you time your training activities appropriately. The amount of time allocated to a particular topic or skill should be commensurate with the value of that learning. In timing your agenda, plan active events after more sedentary segments, and schedule something participative after lunch to keep people interested and involved (and awake).

Resources abound. Use them! Many free and inexpensive training materials are readily available.

Look also to items in your supply cabinet, office, and community that may help you achieve your learning objectives. Bring in guest speakers from management, other departments, and outside. Reproduce handouts that are free from copyright. Be creative in seeking out resources to make your training effective and memorable. And don't forget your participants. Adult learners provide a rich source of knowledge and experience. Structure your sessions to encourage their contributions.

Always know your audience. The more you know about the participants in your training program, the better you can gear the session to meet their needs.

Learn their language, biases, and preferences. Know what they expect from the program and how they really feel about the training you're delivering. Then design the training to overcome obstacles and reach your learners.

Use specific examples from their work settings and translate learning into on-the-job applications for your participants. Make your training as relevant to "real life" as possible. Objectives are more likely to be achieved when training is appropriate to the learners' levels and fulfills learners' needs.

Involvement is essential. Adults learn by doing. They learn because they have a vested interest in the information being presented. They learn when they are paying attention. That means you must get and keep the attention of your participants for your training to be successful.

Involvement is the key. Questions, group work, interviews, debates, case studies, role plays, games, and other participative techniques are effective in getting and keeping the attention of trainees. Vary such activities to achieve an ongoing level of involvement, so that learning can take place.

Notes! Encourage trainees to take them. But remind them that if they try to write down every word you say, they'll miss the next two words. Note-taking is most effective when learners write down just the key words or phrases that will jog their memories on important points.

While we're on the subject of notes, don't read from yours! When you are looking at your notes (or a flip chart, the board, your slides, or a transparency), you are not making eye contact with your learners. When you are not making eye contact with your learners, the lines of communication are closed. Keep communication channels open by making regular eye contact with participants. That means you have to be familiar and comfortable enough with your material so that you don't need your notes (except maybe as a reference).

Instant replay. Review, review, review. People must be exposed to information as many as seven times before they really process and retain it. Summarize at the end of segments. Make assignments for application out of class and between training sessions. Use games and other creative techniques to highlight and review key points.

Don't insult the intelligence of your learners by merely saying the same words over and over. Do use strategies for review that will be both meaningful and memorable to the learners.

Never sell short the value of food. People love to eat and have a good time. Their critiques at the end of the program are as likely to reflect their feelings about the meals and breaks as they are to address the program itself.

You must create an environment conducive to learning for your training to be effective. As such,

you must make sure you develop an atmosphere of mutuality and trust. You must be a good listener, you must show interest and concern for the performances of your learners, and you must provide facilities and provisions that meet the needs of the participants.

When planning for meals and snacks, think healthy! Fruit and juice are better for breaks than coffee and danish. Raisins and candies provide a quick pick-me-up as prizes in a midafternoon exercise. Food satisfies a basic need and makes participants more receptive to learning.

Goals and objectives must be clearly communicated up front. Let participants know what's coming and what's expected of them. That means you have to know exactly where you are headed with the training and exactly what outcomes you are seeking from the learners.

Trainees who have a framework for learning will be better able to respond appropriately and will be more likely to get your message. The communication of learning goals and objectives early in the program will facilitate the process.

Take the time to arrive early for your training sessions. Prepare your flip charts if you haven't already done so. Double-check projector bulbs, cue up videotapes, and get necessary extension cords. Tear your masking tape and stick it on the back of the flip chart so as not to waste training time with such mechanics.

Arrange or rearrange the room. Choose a traditional classroom layout if you will be lecturing to disseminate a lot of information to a lot of people in a short amount of time. Use a horseshoe configuration for training in which total group interaction will be valuable; with chairs in a horseshoe shape, everyone can see each other (and you). Use a modular seating arrangement for programs that involve a lot of small-group work.

Planning and early arrival will help you use your training time better, and thus enhance learning.

Icebreakers warm up the group for learning. Use icebreakers to introduce participants at the beginning of a training session. Icebreakers can help create a positive learning climate and can help you discover learners' training needs and expectations. Plus, they may be used to introduce the theme of the training.

The key is to match the icebreaker with the nature and purpose of the group. Look for icebreakers that are consistent with your focus and that will make your participants feel comfortable. If the icebreaker is threatening or intimidating, the learner will be turned off for the rest of the training (and maybe in future programs, as well). Look for books of icebreakers, compare ideas with friends and colleagues, or make up your own.

Prices are great for getting participants involved in training. Many people are competitive by nature; they will really get into an activity that has a winner and a prize. Games, relay races, team competitions, and other individual or group challenges may be used to facilitate learning, achieve specific objectives, and make training fun and memorable.

The exercises must be expressly designed toward the attainment of learning outcomes. But the prizes may be just about anything you can think of: for example, "Post-it" notes with funny sayings, posters with messages, and various gadgets or devices relevant to the trainees' work or the training topic. When in doubt, try food as a reward. A bag of candy for the winning team in a good training game may work wonders for promoting team spirit.

Sense of humor is an essential ingredient in successful training. As a professional trainer, you must maintain your sense of humor. You must be able to laugh at situations and things. But you must be careful never to laugh at trainees.

You don't have to be a comedian to be a great trainer—use the resources you have. If someone in the program is quick of wit, count on that person for a little comic

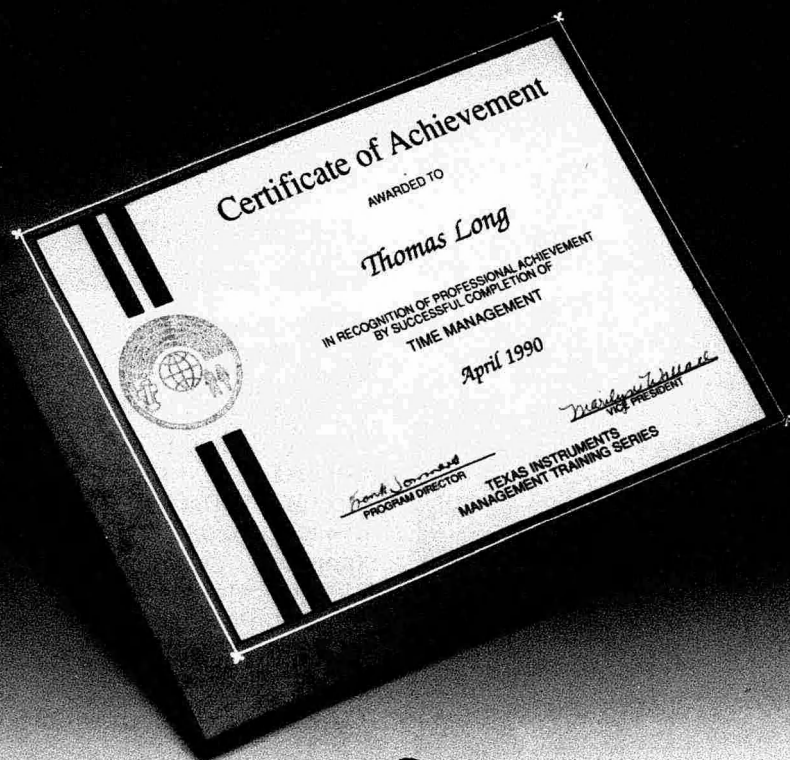
relief. Have learners draw cartoons or tell stories that illustrate a key learning point. Encourage people to laugh; use real-life examples and situations to which they can relate.

Humor can be an excellent technique for eliminating tension in a training room. The key is to take your training material and responsi-

bility very seriously, but not to take yourself too seriously. Have fun.

"Training 101" is edited by **Catherine M. Petrini**. Send your short articles for consideration to *Training 101*, Training & Development Journal, 1630 Duke Street, Box 1443, Alexandria, VA 22313.

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