Training 101

Be a Training Detective

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Don't go into the classroom unprepared. That's standard, common-sense advice, of course. You'd never dream of stepping up to the lectern without lesson plan in hand, handouts neatly printed up, and transparencies in order. But being prepared means a lot more than that. And it begins long before you put together your training presentation.

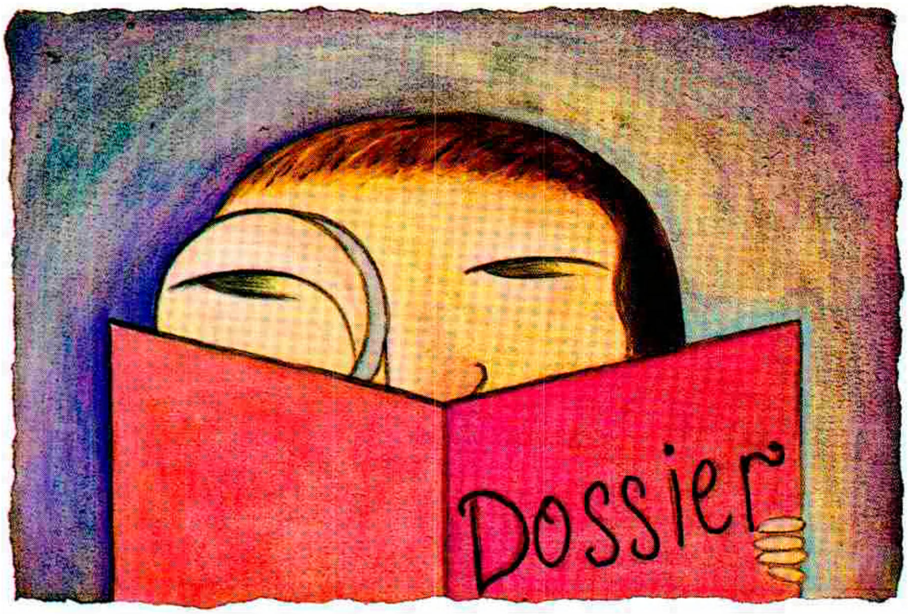
Before you begin training, it is important to know some background information about the firm or the department you're training in. And it's crucial to know something about the trainees. To gather that information, you'll need to do some training detective work.

Part of that detective work should involve a special diagnostic meeting or series of meetings with company officials or the trainees' managers. Use the visit to discuss some important training questions and ensure that everyone's objectives are met.

In short, conduct a complete, formal needs assessment before you attempt to build a training course. An assessment can involve a wide variety of resources and tools:

- a general questionnaire or short surveys
- interviews with some prospective trainees and their supervisors
- performance records and documents
- information on the company's or work unit's training history, including successes and failures
- a review of the organizational climate, culture, and levels of support.

While making use of all of those



resources and tools, you should keep in mind five basic questions about audience makeup and motivation, the training site, learning objectives, and available resources. The questions cover the classic "five Ws and one H": who, what, when and where, why, and how.

Who needs training? Knowing some background information about the trainees can be invaluable in determining their needs, motivations, and obstacles.

Of course, the number of trainees is a practical place to start. You'll need to know how many participants to expect, in order to set up the training room and produce appropriate numbers of handouts and training materials.

Other key areas of background information include age, sophistication, gender makeup, levels of education and experience, and workplace climate. Let's look at those areas in more detail.

What are the age levels of the trainees? Know whether trainees tend

Before you step up to the lectern, do some sleuthing to find out everything you need to know about your class. The questions to ask include who, what, when, where, why, and how.

Illustration by Roxana Villa

to be younger or older employees. By asking age-related questions, you can gain insights into trainees' age-related developmental needs or concerns.

What are the socioemotional or sophistication levels of the group? By ascertaining trainees' levels of maturity or sophistication, the trainer can determine comfort levels, participant readiness, and relevance of training ideas. For example, if trainees are relatively sophisticated, a trainer may not have to teach elementary principles that the group already knows.

What is the ratio of men to women in the group? Sensitivity to gender issues is very important. Some illustrations and examples used during training are likely to be more meaningful to one sex than to the other. For instance, with many audiences, a hunting analogy might be of more interest to men than to women.

What are the educational backgrounds and levels of the participants? Try to pinpoint your audience's likely levels of comprehension. Then, rather than aiming your instructional level either too low or too high, you can make sure it's just right for the participants.

Know the participants' educational limitations, including any diagnosed math problems, reading difficulties, writing deficiencies, or other special needs.

What are the experience levels of the trainees? You can't prepare appropriate training materials unless you know whether the learners are at a beginning, intermediate, or advanced level with the subject matter. Know whether intermediate or advanced training should be the focus of the training sessions—or whether participants still need remedial work on the basics. It might prove embarrassing for the trainer to arrive at a session with only a "brown-bag" set of materials, when the group is actually ready for the "silver-service" phase of training.

Ignoring trainees' experience and educational levels can have disastrous effects. In one case, a trainer attempted to conduct an advanced-level training session for emergency medical technicians. The trainer had to adjust the training content dramatically after learning that the audience was a group of volunteer fire fighters, some of whom were nonreaders.

Five Crucial Questions

Before you put together a training course, you should fully explore the answers to these five questions:

- Who needs training?
- Why are the participants attending the training sessions?
- When and where will the training take place?
- What is to be learned at the training sessions?
- How much will the training cost?

Determine any barriers that may prevent participants from learning. You can begin this process by reviewing their training history, including the outcomes of previous training. Were the sessions positive or negative? Why? In what specific areas, and under what circumstances were they positive or negative? Explore and explain the answers you uncover to these questions. Discussion of such responses is a useful assessment strategy; it can be the basis for building further training.

It is vital to be knowledgeable about the company or unit in which the trainees work. Whether you are an internal trainer or an external consultant, you'll need to take a good, hard look at the organizational culture and climate.

What are the company's philosophies, policies, and practices regarding its employees? What are its philosophies on training? Can you describe its management practices, communication patterns, and levels of support?

Knowledge of the organization's or business unit's climate, structure, environment, and working conditions alerts the trainer to any organizational barriers he or she might encounter in the training sessions. Some questions to research:

- Is there an "open" or "closed" management system?
- Does communication take the form of top-down directives or memos from the CEO? Or does effective communication also spring from the bottom of the organization up, and run across departments?
- What are the company's policies and practices regarding training? Does the firm grant release time for training? Does it provide financial support for attendance at conferences, workshops, and training sessions?
- Does the organization take a proactive and enlightened learning approach to training and staff development?

Knowledge of organizational issues and history can help a trainer to identify any "hot spots"—those topics that a trainer should address or should avoid while planning and conducting training. For example, an external trainer once proposed an off-site training session to a company's top managers—and was quite embarrassed to learn that the firm had just spent more than $12 million developing its own, brand-new training facility.

Other sensitive issues that a trainer—especially an external trainer—might need to study and take into account include business ethics, age and gender issues, affirmative-action practices, and promotion and tenure policies.

Why are the participants attending training? Find out whether participants have enrolled in training of their own accord or because of organizational or managerial mandates. It can make quite a difference in their attitudes and approaches to learning.

When training sessions are compulsory, a trainer may have to overcome strong participant resistance. The trainer can defuse defensiveness or even hostility by projecting him- or herself as a caring friend, a facilitator, or a guide, rather than as a teacher or other form of authority. A smile and an extended hand of welcome can help relieve tension, hostility, or fear. Be honest and friendly. Get across this message: "We're all in this training business together. We can learn from each other, and we can help one another succeed."

Trust must be earned. And it can be, over a period of time.

What are upper managers' expectations for the training sessions? What are management's special needs? A skillful trainer should inquire about these expectations and concerns beforehand. Does upper management have a hidden agenda for providing this particular training for these particular people at this particular time? If so, it behooves the trainer to be well informed about the firm's expectations, purposes, and agenda.

Consider the company's benefits or reward systems for employees who attend the training. Will managers and supervisors give some kind of recognition to successfully trained employees? Will certificates of accomplishment or continuing-education units be awarded? Will participants receive any special pay incentives, promotions, status changes, or other benefits? What kind of recognition or emotional support will trainees' peers provide? Will advanced training be acknowledged as a perk, or as an incentive for attending future sessions?

Learn about the participants' special expectations or needs for the training sessions. If you know what they want to learn, you may be able to address their personal objectives.

Have the employees met to discuss their training needs or problems? If they are looking for special on-the-job techniques or improved skills, will those be the focus of the training session? Will the training objectives be based on team-building skills and better communication patterns? Do the goals of the session include attitude shifts, team strengthening, work-group development, or just plain rest and relaxation? And do those goals mesh with the goals of the participants?

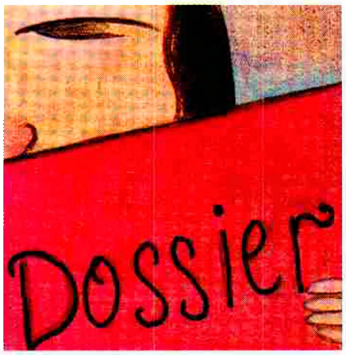
Is the focus of a training session organizational change and development? If so, it might sound like a noble objective, but it's nonsense. Real, lasting change will not be accomplished by one training session—or by a couple of sessions. Change may occur when there is a complete revamping or evolution of company philosophies, policies, and practices. The change process can be accomplished through company visioning and mission-development sessions and major strategic-planning sessions. But one class just can't do it.

When and where will the training take place? Once you have researched your trainees, their work environment, and the company's expectations and approaches, you can begin to make some decisions about your training course.

"The where" and "the when" of training are crucial pieces of information for determining effective learning and staff development. A comfortable setting and necessary training aids are vital for adult learners and effective trainers. First, consider whether training will take place on site or off site. Both options have advantages and disadvantages.

For off-site training, find a quiet place such as a hotel or motel—or better yet, find a retreat-like setting, such as a resort, where trainees' spirits and attitudes can be renewed and refreshed as they deal with the content of a full training agenda.

Work-site training sessions can reduce travel costs as well as meals and housing expenses. But on-site classes involve their own set of logistical issues. Is a training or conference facility at the company available for the sessions? Are there adequate classroom facilities with comfortable chairs and wide tables (so that the participants can spread out their instructional materials)? Is there movable furniture—so that small-group discussions can take place in settings that encourage conversation and feedback?



The training environment can play a large part in determining whether the concepts and principles trainees learn in the presentations can be translated into practice. For example, one of the most effective room designs for training is the U- or horseshoe-shaped room arrangement, in which eye contact, venues for presentation, and discussion are paramount. Know ahead of time whether audiovisual aids will be available. You may want to make use of an overhead projector and screen, a VCR and a TV or monitor, newsprint, a chalkboard, and other training tools.

Will enough refreshment breaks or coffee breaks be scheduled? Not all learning takes place in the classroom. In many training programs, a great deal of the learning comes through informal discussions of on-the-job applications—discussions that take place among groups of participants standing around the coffee pot after a lecture.

Adequate heating or air conditioning, proper lighting, good ventilation, and no-smoking policies are definite musts to add to the list for enhancing the physical comfort of adult learners.

Will lunch be served to the trainees on site as a "working lunch"? Or will the trainees use the lunch period as a time for renewing personal acquaintances and sharing professional experiences?

Consider the scheduling of the training sessions. What timetable is proposed? Are the training objectives realistic within that time frame? Will participants need more time to internalize the major concepts or principles? How much practice is adequate for them to learn the necessary skills? Should other special scheduling requirements be taken into account?

Is this the best time for training? Are production schedules too tight? Are there overwhelming previous commitments or pressing assignments? If the schedule seems unrealistic or inconvenient, don't be afraid to question it. Why is the training happening now? Who says so?

Look at the length of time that the training will be scheduled for. It may be a full day or part of a day. It may even be two or three days. Is it enough time for the class to follow a progression of ideas, to reach a conclusion, and then to recapitulate the major applications?

You'll need some sort of master training agenda. This should be developed by the course planners, with trainees' input of ideas.

For some kinds of training, it's important to allow participants time for field tests and applications, in order to practice the concepts they've learned. If your course includes such work, consider any necessary arrangements for going off-site for field tests. Will there be transportation there and back? Be sure to build enough downtime into the program for internalization of the new principles and for discussions about how to modify the new ideas and incorporate them into trainees' work. Know when these processes will take place, and how.

What is to be learned? The content to be learned is, of course, central to the training process. Course plans, assessment strategies, instructional principles, and training techniques all revolve around "the what" of training. Now is the point at which you get involved in actually putting together the training content and testing it out.

Once you've determined that there is new information to be learned in a training session, you'll need to consider all the implications. You'll need to develop outlines and learning objectives for proper sequencing of ideas, to organize detailed topics for learning modules, and to share your lesson plans with the trainees. Once you put together the course, consider the questions in the box on this page.

But the most crucial question is this: Does the trainer relate the material to the trainees' needs?

Answering that question includes consideration of several issues. For instance, you may need to pay special attention to the needs of educationally or physically challenged trainees. For all training participants, you'll need to be sure that the skills and techniques you teach will build on trainees' existing skills and on techniques that are already familiar to them. You may need to use positive imagery or visioning techniques to help in the learning process.

All training participants have their own styles of learning and their own ways of processing information. Most classes include trainees with a mix of styles. So you should plan to use a variety of teaching methods and approaches in your training. Have you allowed for a good mix of hands-on learning activities, in addition to presentations? Have you built in adequate time for discussion and for independent study and research?

Keep in mind the principles of good teaching techniques—and, especially, of adult-learning practices. Use instructional patterns that break whole concepts into individual parts, and then put them back together to show how the parts connect. Make sure that participants have the chance to practice new skills. Then allow for coaching and for critiques of their performance, and for additional participant practice, to cement the new ideas.

Questions on Training Content

- Have you paid special attention to the proper pacing of instruction for internalization of ideas?
- Have you used relevant, memorable illustrations?
- Does the lesson plan include many questions and "what if" queries?
- Is there a good balance between research theories and meaningful practice?
- Do the theories address or support the work-site problems or questions under consideration?
- Will the participants be able to apply the theories on the job?

You'll need to be certain that participants really hear the ideas that are presented, and that they grasp them confidently and thoroughly. In designing and in running the class, always keep in mind your own expectations and those of the participants, to be sure that all objectives are clarified and met.

Consider course-evaluation issues as part of your needs-assessment process.

After the class, you will need to know whether the sessions have been effective and meaningful. Determine ahead of time how you will go about collecting that information. How will participants evaluate the course? What criteria will they use? How will you evaluate it—using quantitative measures such as statistical analysis? What about personal interviews to ask for participants' feedback? What about future effects and follow-up measures? Will additional or advanced training be scheduled as a result of participant feedback and evaluation measures?

How much will it cost? As you conclude your initial diagnostic interviews with management, you'll have to address some issues regarding the training budget. If you're an external trainer, the first area to address is payment for instructional services. Will a contract be made between instructor and firm?

Discuss payment procedures for the instructor's fees. Will the trainer be paid by the hour, by the session, or by the day? Will the trainer be paid for time spent gathering materials, writing and preparing handouts and visual aids, and writing the training schedule? What about compensation for all the other preparation steps that are necessary for a successful training program?

What about consultant expenses such as travel, meals, and overnight housing accommodations? How will you handle budgeting? Will you submit a budget of training needs and expenses to the firm? What special training perks might the company offer trainees? For example, some firms include notebooks, pencils, pins, or photographs of trainees or of special events.

Putting it in writing. The scope, depth, and length of any training program should be determined as soon as possible after the initial diagnostic meeting with company officials or trainees' managers. Certainly, trainers should be sure to address such issues before they commit to providing training—especially if that commitment will take the form of a contract or other legally binding agreement.

The purpose of the diagnostic skills-training model is to provide an overall assessment process. It is best for trainers, managers, and trainee representatives to discuss the training parameters and come to agreement on what training is needed, why it should be provided, when and where it will be provided, and how much it will cost. Writing a training proposal is the next logical step in the process.

Once you've answered the crucial questions—who, what, when, where, why, and how—you'll have the information you need to put together a successful training program.

"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.*