Training 101

A Perfect Fit

Learning disabilities are an everyday reality for ten percent of the population. Luckily, trainers who are sensitive to learning problems can easily adapt instructional methods to help make training meaningful for LD learners. A vocational-education expert tells how.

Sometimes, trainers have to adapt training programs to meet the needs of all learners. Many off-the-shelf instructional programs are excellent and economical, but include role-plays, case studies, and self-assessment exercises that aren't quite relevant to the organization, the trainees' jobs, or the training objectives. Customizing a packaged training program may be the solution; here are some guidelines for achieving a perfect fit.

Maybe you're developing your own program, but need to bring in an outside writer. How do you ensure a successful match between your training needs and the writer's approach and abilities? Many government agencies use Requests for Proposals; you can too.

Don't Overlook the LD Factor

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Learning problems are not new. Losing track of the twelves in multiplication tables, confusing 12:30 with 6:00, and putting *e* before *i* except after *y* are problems that most of us eventually sort out without permanent damage. But for many people—one in 10, in fact—learning problems don't get better and don't go away. Such problems are called "learning disabilities," and they affect trainers' jobs as much as they affect the jobs of math and English teachers.

The best known learning disability is dyslexia. To a dyslexic, a printed page may seem like a scrambled maze of letters—a serious problem in any course of study. Treating dyslexia and other serious learning disabilities is best left to experts. But less severe disorders can also hamper learning success. Trainers need to be sensitive to such problems; a little fine-tuning can go a long way toward adapting instructional methods for LD learners.

Common learning problems

Trainers can easily identify three kinds of learning problems:

- Probably the most common learning disability is simple memory deficiency—not being able to recall steps that were explained before a lesson, written on a blackboard, or taught in sequence. A closely related problem involves confusion of priorities and performance standards—a real drawback in the work setting.
- Performance-processing difficulties cover a range of weaknesses; let's call them problems in learning from experience. For a skilled learner, deductive reasoning and applying such concepts as relative weight, mass, force, distance, and energy are intuitive. An LD learner requires much more time to integrate those components. To such a person, solutions to problems in the work setting—even familiar problems—are simply not apparent.
- Perceptual disorders affect the ability to make judgments. Learners with such disorders may be unable to gauge distances, budget time, make comparisons, and anticipate outcomes. Interpersonal relationships suffer when disabilities extend to social perception, impeding both role-playing and communication skills. The LD worker doesn't initiate tasks, spends too much time on a single task, or cannot coordinate process steps.

Road maps for learning

Skilled learners carry road maps in their heads that help them toward their destinations; LD learners need to have the maps in their hands. With a little planning and an understanding of the special needs of trainees with learning problems, the trainer can help provide those maps.

Adapting your instructional techniques for the LD learner is easier than you may think. First you have to get past the notion that adapting is a form of oversimplifying.

Here are five ways to keep in touch with the LD learner.

- **Be sure the learner is following presentations and directions.** Eye contact and proximity are important. Get the learner accustomed to giving you nonverbal signs when he or she is on track. Fill out blank prep-sheets with simple steps to guide the learner through the task ahead. Have the learner tape a prep-sheet to a wall or piece of equipment in the work area for easy reference.
- **Include visual references, but keep them simple.** A page of diagrams is of no use to a worker with perceptual disorders; neither is a whole folder of diagrams. One well-placed image at a time is the key. If the worker cannot explain a procedure using the diagram you've created, the visual reference is useless. Throw it away and try again.
- **Relate, relate, relate.** Obviously, direct explanation is necessary in training, but telling is not teaching. Make sure that all new information is well grounded in memory by relating it to learners' past experiences and understanding. Use comparisons and contrasts. Be sure learners understand sequential elements. Check for appreciation of cause-and-effect relationships to be sure workers understand the "what-ifs" of an operation.
- **Get feedback.** Asking for questions is never enough; on the other hand, asking someone to explain how all the small steps fit into the big picture is often unnecessary.

If learning has taken place, the learner should be able to enumerate, demonstrate, or illustrate the elements of the task. Be sensitive to the ways people feel comfortable about relating that information to you and judge accordingly.

■ **Show and listen.** This is not the same as "show and tell." Show and tell is a strictly one-sided event; show and listen is a process of mutual comprehension. Be alert to whether learners are picking up whole/part relationships, conditions, generalizations, coordination or subordination of elements, relationships of time and place, and concepts of quality. Listen to body language and probe for understanding. Avoid impatience.

More than a training show

A popular axiom says that trainers should "assume the worker knows nothing." From the aspect of thorough preparation of materials, that makes sense, but no matter how basic the training program or how simple the task, each individual is uniquely relating the material to a personal road map of experience. For a worker with learning disabilities, that road map is constantly under revision.

Trainers who appreciate the complexity of the struggle to learn will do more than deliver a training show. They will help organize meaningful learning experiences for all learners, and will take pride in the design of those experiences.

How to Customize a Training Program

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Many firms buy packaged training programs because they cannot develop programs in-house that match the quality and economy of products from outside suppliers. They have decided that the skils taught in the packaged training programs match their needs relatively well—even if the specific case materials that accompany the programs do not precisely fit their organizations (or even their industries).

Such organizations can enhance the relevance of packaged training programs by customizing the case materials provided by suppliers. Customization makes training more interesting to learners and more relevant to their jobs. It helps prevent a "Yes, but my job is different" reaction, because learners can clearly see how the skills presented in training apply to their jobs. Customizing case materials takes time, but it is usually worth the effort.

Case by case

Several kinds of case materials are provided in packaged training programs. The more common types include

■ **role-play or "skill practice" scenarios**, which provide background information on a situation to be enacted by learners (for example, supervisors role-play a performance appraisal with an employee who has demonstrated less than satisfactory performance);

■ **case studies**, which demonstrate the use of analytic techniques or provide learners with opportunities to practice them (for example, learners are asked to practice decision-making techniques by choosing a word-processing system using background information provided);

■ **self-assessment exercises**, which provide feedback to learners on their approaches to specific situations (for example, before being taught delegation styles, learners choose responses to a list of delegation situations, and then score their responses to determine their own delegation styles).

Of those three kinds of case materials, role-play scenarios are generally the easiest to customize, since they usually consist of just a few paragraphs of background information. Case studies on analytic techniques usually include more detailed facts, and require more careful customization. Some self-assessment exercises can be tricky; those doing the customizing must be careful to maintain the validity of the feedback provided to learners.

Some training professionals caution trainers not to use case studies or practice exercises that match trainees' organization and jobs too closely. They warn that learners may focus too much of their attention on the content of cases and too little on the processes being learned. That problem usually results from unclear learning objectives, ambiguous or misleading facts within the case materials, or case situations based on real and "hot" issues facing the organization. At such times, learners may focus attention on aspects of the case materials that are unrelated to the learning objectives. You can avoid that problem through careful planning.

The following guidelines will help an organization reap the benefits of customizing packaged case materials and minimize potential problems.

Get permission

If needed, secure permission from the supplier before you try to customize a packaged program. If your contract prohibits or restricts alteration of materials, approval must be obtained first. Many training suppliers welcome customization, but some may raise objections, especially if they provide customization for a fee, or if an organization's use of its own customized case would reduce the quantity of materials purchased. It's best to negotiate permission before you buy the materials.

If you're having trouble getting permission, consider offering to make the customized materials available to the supplier for sale to other companies of the same industry. Of course, you'll need to remove any clues that would link the case situation to your company, and make sure that sharing the case with others in your industry would not give other companies a competitive advantage.

Decide what to customize

The next step is to determine which case materials within a packaged training program should be customized. That decision should depend primarily on the complexity of the existing case materials and the availability of such resources as time and expertise.

Background information for role-play exercises is rarely complex. Most case studies for the demonstration or practice of analytic techniques are complex only in the amount of information and analysis required. Self-assessment exercises can be complex if they measure subtle differences through sophisticated computations of learners' responses.

The self-assessment exercises that lend themselves most easily to customization are those that present a series of situations (usually 10 to 25) with multiple-choice responses. Answers are totaled for each category of response.

For example, a self-assessment exercise on conflict-resolution styles might present 20 situations with five possible multiple-choice responses for each. After completing the exercise, learners are given a key matching five styles of conflict resolution to the five responses for each question. The learner uses that information to determine his or her predominant style. Customizing such assessments is rather easy, provided the trainer understands the differences between the styles and can determine which factors in each multiple-choice response make it represent a particular style.

For some companies, limited time and expertise may make it impossible to customize all of a program's materials. In such cases, you should determine which parts of the program will be more meaningful to learners if they include demonstrations of job relevance. Also, consider where in the program you may need to peak learners' interest.

Learn by objectives

Establish the learning objectives of the case. Effective case materials directly support the learning objectives of the training. For example, in a training session on how to discipline employees, each customized case situation must indicate disciplinary action. Learners will probably raise objections to a case that describes a situation that would warrant only an informal discussion between supervisor and employee.

Sometimes, the supplier does not make clear the specific learning objectives for a case study or practice exercise, even if most major learning points are covered in the case. At such times, the trainer must review what will have been learned by that point in the training, and recognize any nuances of the skills being taught that are introduced in the case. Trainers must also be aware that case studies may introduce learning points not previously taught in the training session.

The trainer should determine which learning objectives the original case exercise was designed to reinforce. That information can serve as a road map for the development of the customized case.

Ask an expert

Enlist the support of a content expert to develop the customized case materials. In order to develop a case that is relevant to learners and accurate in content, you must be sure that someone who is familiar with the learners' work will be involved in the customization. The content expert could be yourself, someone who will later be a participant in the training seminar, or a manager of the trainees.

Choose a job situation

Once you know which case materials need to be adapted and who will do the customization, you must choose and develop a job situation to replace the prepared case exercise. Make sure the situation you use is not one that the organization is currently resolving or has recently addressed. If a case encourages trainees to place blame, or if learners believe management is not taking proper action in the real-life situation, they will surely get absorbed in the content of the case to the exclusion of the skills to be learned.

If similar training has already been conducted in the organization, learners may have been asked to apply the skills to their own job situations. Ideas for customized case situations can be generated from a list of job situations brought up by previous classes.

The situation chosen should be one that would typically be faced by the trainees. If you ask a group of first-line supervisors to conduct a decision analysis on whether to close a manufacturing facility, you're inviting the response, "but someone in my position would never be asked to make such a decision." It would be more appropriate to ask first-line supervisors to analyze decisions on how to cut expenditures in their own work areas.

In developing the customized case, attempt to include facets of the case that make or reinforce as many as possible of the learning points in the original case. Look at your list of learning objectives. You may not be able to include all the objectives in one case, but you may also be able to include some learning points not addressed by the original case.

While trying to include as many learning objectives as possible, remember to keep the case simple. Learners should not have to do too much reading to complete the case. Balance the desire to include all learning points with the practical need to keep the case brief and unconfusing.

Frequently, the content expert can write the preliminary draft of the case, using as a guide

■ the learning objectives you have identified;
■ the original case materials;
■ the trainer and participant materials that lead up to and follow the case exercise;
■ the rule of keeping the case consistent with organizational policies and procedures;
■ the "keep it simple" rule.

Review the case

Before using the customized case materials, have them reviewed by at least two other people. Reviewers should include at least one other content expert and one other person who is knowledgeable about training methods. You may also wish to ask the training supplier to review the customized case materials. Reviewers should assess each customized case by asking the following questions:
■ Does it serve the learning objectives?
■ Is it a situation likely to be addressed on the job by the workshop participants?
■ Is it accurate? Does it contain anything contrary to organizational policy or procedure? If a case resolution is provided, is it the only adequate resolution, or should others also be mentioned?
■ Have we addressed all potential pitfalls in using this case? (For example, the case may be so closely based on an actual situation in the company that learners might guess to whom the case is referring, or may want to discuss what actually happened.)

Different reviewers will be able to contribute more or less to each question. Based on their input, you can decide to use the case with no revisions, to make minor revisions, or to scrap the situation and start anew.

Look before you leap

Plan ahead for the first time you use the case exercise in a training session. Do a pilot test of the customized case materials, with an evaluation. Include a section in the evaluation for participants to comment on how well the customized case study helped them practice the skills on a relevant job situation. Use that information to make any revisions to the case exercise and to plan future customization efforts.

Give them some credit

Remember to acknowledge any people involved in developing the customized case material. That recognition may be well-deserved by your content expert and reviewers, and will also encourage future line-management involvement in your training efforts.

The Right Writer

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More and more, employers are relying on writers from outside their organizations to meet their training needs. But hiring an outside course writer can be tricky; you can minimize rewriting and editing by selecting the best writer for the job. But how do you pick the most appropriate person from a pool of writers who appear to be equally qualified? A device used in government offices is the Request for Proposals.

Requests for Proposals, known in the public sector as RFPs, are bids for service provision. Government agencies have limited resources, and can be held accountable by public scrutiny for each outlay. The RFP helps ensure that the agency is making the best use of tax dollars. When applied to HRD concerns, especially something as sensitive as curriculum design, the RFP is a valid tool that helps ensure a close match between your trainees and the course materials.

A development proposal can reveal more about the kind of training document you will receive than can a mere writing sample. A writing sample gives you an idea of the writer's style and training methods. It does not give you a hint about how well the writer can adapt his or her style to suit your training group. The proposal gives you a preview of what a writer can provide—tailor-made for your trainee group—in a specific subject area. A close match between the course writer and the training group and objectives is imperative.

Eight steps to effective RFPs

Here's how to put together an RFP to increase your chances of getting the perfect proposal.
■ **1. Assemble a task force** that knows the trainee group, their learning needs, and training in general. Choose task-force members who have different interests in the training outcome. Collaboration on the front end ensures that all vantage points are considered in the design. Poorly stated directives are costly to correct.
■ **2. Describe the trainee group.** Describe pertinent prerequisite courses or other tangible learning experiences trainees have had. Include a demographic overview of the group.
■ **3. Formulate and list objectives** of the course.
■ **4. Determine the learning needs** of the trainee group, specifying the kinds of learning activities that are desired. That may include experiential activities, case studies, role plays, computer-assisted learning, and simulations.
■ **5. Describe the environment or physical setting** in which the training will take place.
■ **6. Draft an example of a good proposal**, one that you would accept. A clearly stated guide will

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help prospective writers to adhere to the style you are most likely to use.

■ **7. Ask to receive proposals in a format that is conducive to objective review.** For example, a proposal's cover page, with the title and the writer's personal data, should be detachable from the rest of the proposal.

■ **8. Specify the length of proposals.** You may want to solicit only queries, if the writing task is simple. For other jobs, you may want prospective writers to submit detailed outlines for the first hour of the course. Or, you may ask that they describe the methodology for the entire course. Base that decision on your training needs and the complexity of the writing assignment.

Satisfaction

Many technical experts can tell you how something can be done, but few can actually draft the ideas in a logical format conducive to the training environment. The RFP process can help you learn which writers may work best for you. The more information you are able to secure through the proposal, the more satisfied you are apt to be with your final selection.

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