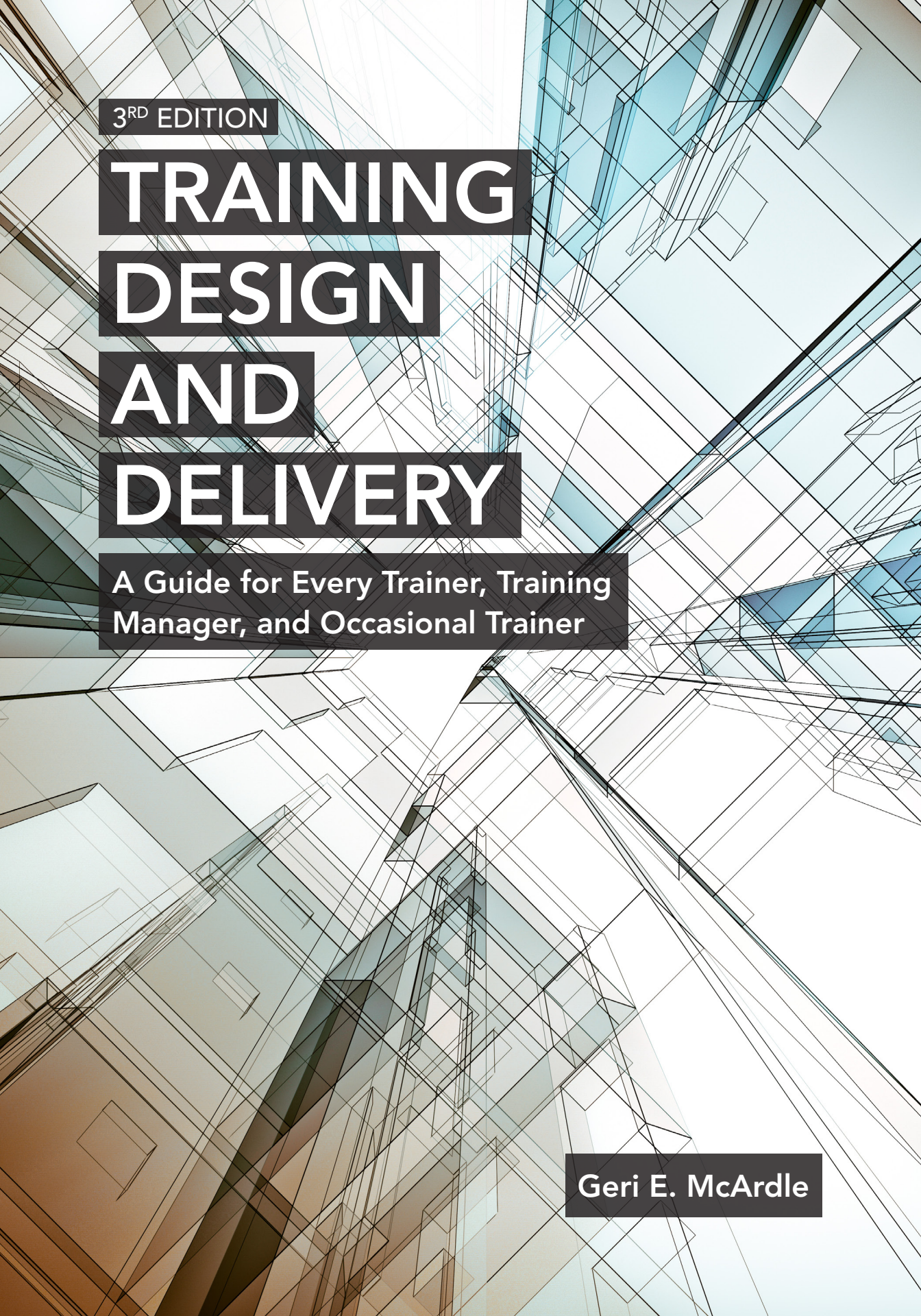


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3RD EDITION

TRAINING DESIGN AND DELIVERY

A Guide for Every Trainer, Training
Manager, and Occasional Trainer

Gerri E. McArdle

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atd

PRESS

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ATD Press Editorial Staff:

Director: Kristine Luecker

Manager: Christian Green

Community of Practice Manager, Learning and Development: Amanda Smith

Text Design: Fatimah Weller

Cover Design: Maggie Hyde

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Preface

Management offers education and professional development training, geared to increase personal and workplace satisfaction, motivation, and productivity. However, the return on investment is only realized if training programs, both informal and formal, are well defined, delivered, and evaluated.

The third edition of *Training Design and Delivery*, provides a comprehensive resource for training managers and trainers who are responsible for the planning, organization, design, implementation, and evaluation of training programs.

The first part of the book provides basic training design strategies that will enhance presentations and entice learners to participate in the learning process. Specific strategies include ways to create training programs that guarantee successful transfer of concepts on the job, detailed descriptions of how learning occurs and how to manage the training-learning interactions with ease, and ways to establish trainer and presentation credibility early in a training presentation.

The second part of the book presents an easy-to-use recipe for designing and developing training by utilizing a training systems development model. This theoretical model establishes the building blocks to use when organizing your training topics. It presents a 20-step process for analyzing, designing, developing, implementing, and evaluating trainings. The third edition of this book includes three new chapters in this section. The first, “Using Technology,” discusses the uses and abuses of technology as a learning tool. The second, “Project Management,” presents an eight-step process to help you manage your next training design and development project. Included is a set of training project design templates and a comprehensive outline to guide you in presenting a successful “kickoff” project meeting. The third chapter designs the critical steps involved in preparing and facilitating training to an international training community.

The last part of the book is a trainer’s toolkit, providing answers to the major problem areas encountered during design and implementation. The toolkit has two sections. The first describes the technique, and the second, the application of each technique.

PREFACE

The third edition is applicable to training in almost every sector: commercial, industrial, and educational, in both the public and private sectors. I wrote this book with myself in mind. When I began my career as a trainer and human resource manager, I couldn't find a simple book that described the steps to use in developing and implementing training. I promised myself that once I'd mastered the process, I would share it with others so they would have a road map.

—Geri E. McArdle

May 2015

Introduction

These are exciting times. With advances in computer learning technology, we're all witnessing a revitalized effort in the fields of knowledge engineering, expert systems, and multi-media educational technology. For many people, these emerging technologies are tools in training design and delivery systems, as well as in the way we study learning and conceive the learning process. My discovery of the instructional systems development model in the training industry and the current movement toward performance systems technology had an effect on my role as a trainer and an instructional designer. Training must consist of a well-planned, organized learning event that can ensure an outcome for the learner and the sponsoring organization. I'm sure you, too, have encountered or are starting to encounter ripples from these trends in designing and delivering training programs that provide a return on both investment training dollars and the use of cutting-edge technologies and training tools.

TRAINING BASICS

Learning is all about helping people to develop as individuals and career professionals. The core of this development is training. Training can increase individual competence, as well as open doors for future opportunities. The first part of this book presents a review of the tools, techniques, and strategies that trainers and instructional designers use to develop basic training content.

During the past two decades, the training field has been one of the more rapidly growing business sectors in the U.S. economy. This growth is in response to the rapid expansion of the global marketplace, the increase in diversity of workers, and the global demand for a skilled workforce. Further, the knowledge and skills gained by workers just a decade ago are, in some cases, no longer sufficient to equip a person for a lifetime of work.

As organizations grow, learn, and change, training must evolve. Finding, and especially retaining, qualified candidates to meet long-term organizational needs is becoming critical to corporate success. As a result, organizations are no longer just providing job-specific, technical skills; rather, they are focusing more on training that develops

INTRODUCTION

the entire person. Such offerings—managing stress, team building, dealing with difficult people, analyzing personal styles, solving problems creatively, and building consensus and sensitivity to diversity—are becoming part of the standard corporate curriculum. By encouraging employees to learn more about themselves and their capabilities, and to take responsibility for their own learning, organizations are banking talent for future use.

As trainers, we need to enhance our skills so we are able to motivate participants to learn more about themselves and their capabilities as they relate to the organization and to create a desire for self-directed learning. The need to provide training in a variety of venues is becoming increasingly important. Trainers who understand and can design and use e-learning, distance learning, blended learning, and self-study along with traditional learning are in high demand.

Now is the time to develop a new training system—one that prepares individuals for this change. Trainers should be moving away from the traditional method of transmitting knowledge and toward helping people to view learning as a lifelong activity. As trainers and instructional developers, we should change the delivery emphasis of *what* knowledge or skill we affect to *how* we help people to learn and ask questions to help them acquire skills of self-directed inquiry.

TRAINING DESIGN

No matter how high-tech or low-tech trainers and their training designs may be, the designs will have to adhere to the demanding standards of training design. No training is successful unless the instructional design meets these standards of quality, and the quality of design, development, and delivery is based in a scientific approach in the area of human learning.

The multistep training program design tool in the second part of this book is an easy-to-use guide for designing and developing a training module and program, whether it's computerized or a low-tech, in-house workshop. The steps take trainers from responding to the initial training request to delivering and evaluating the training program. Specifically created for this book, the training program design tool sets forth a number of critical elements. Although hundreds of training practitioners use these critical elements when they design and develop training programs, the training program design tool organizes the steps

and begins with a little-used step: business justification. This first step leads management to buy-in to the training, which is essential. By following the training program design tool, trainers will be able to provide successful trainings.

Part III presents tools and techniques that trainers can use to open a training, conduct a review, and close with a bang. Enjoy the training journey that this book provides as a source in your everyday practice.

As with the first and second editions, the third edition focuses on proven principles and tools to develop effective training programs. However, a significant addition is the focus on training delivery systems that were just emerging a decade ago. These new systems and their technologies are having an immediate and far-reaching impact on training. Therefore, in addition to the techniques for analysis, design, and development of training programs, the fourth component, delivery, has been updated to reflect the advancements in technology.

Less than a decade ago flipcharts, webinars, slide presentations, and handouts were commonplace for delivering training materials; now the speed and specificity of today's technology requires a new mind-set if we are to best help people develop their natural talents.

The Association for Talent Development rebranded from the American Society for Training & Development because, while training and development remains the core of the profession, the scope of its members' work is much broader than what its founders imagined. ATD's future will be determined by the work done in developing the talent of today and tomorrow, and will include the latest technologies for delivering that work.

Contemporary training already includes a variety of high-tech products, whether it's interactive training delivered within the corporate network or via the Internet. Moving ahead, the effective delivery of learning will include a mix of high-tech and live classroom experiences. A balanced and blended strategy for delivering training offers the most promise. The following are examples of the types of technology making inroads into the training industry.

Multimedia training: This training combines audiovisual training methods with digital training. Computers or other digital devices provide the learning stimulus in an interactive training experience. The learner responds; the computer or device analyzes the responses and provides feedback to the learner.

Online learning or e-learning: This is instruction and delivery of training online via the Internet. Internet-based training is delivered on public or private networks. Intranet-based training uses the company's own network.

Gamification and learning games: These approaches to learning can be used to structure learning experiences into challenges and provide feedback loops; aspects that engage people and help foster behavior change.

Storytelling in training: Research shows the value of stories in helping people remember. It's more difficult to remember discrete facts, for instance, than it is to remember those same facts when they are part of a narrative.

Visuals and graphics: Along with the use of storytelling, designers are shifting away from screens filled with text to ones dominated by visuals. For trainers, visuals can be used to help educate people on facts and build awareness.

Teleconferencing: This is the synchronous exchange of audio, video, or text between two or more individuals or groups at two or more locations.

Interactive distance learning: This latest generation of distance learning uses satellite technology to broadcast programs to different locations and allows trainees to respond to questions posed during the training program.

Blended learning: This combines online learning, face-to-face instruction, and other methods for distributing learning content and instruction. In comparison to classroom delivery, it provides increased learner control, allows for self-directedness, and requires learners to take more responsibility for their learning. In comparison to pure online learning, blended learning provides more face-to-face social interaction and ensures that at least some of the instruction is presented in a dedicated learning environment.

THE GROWTH OF TECHNOLOGY IN TRAINING

As stated in the ASTD's *2013 State of the Industry* report, in less than a decade, new technologies are now rivaling instructor-led training. They have made it possible to reduce the costs associated with delivering training, increase the effectiveness of the learning environment, and help training contribute to business goals. A couple of factors are driving the change to technology, blended with methods that are more traditional.

From a training point of view, research shows that e-learning is the number one technology-based learning and performance support method in which organizations will invest. Learners want training programs that are as short and as efficient as possible—programs that are delivered just in time for application. As a result, organizations will not waste the time and effort of their valuable human resources on something that does not work. Keeping the learner's attention will be an increasing challenge. A generation raised on TV and computer games, with short attention spans, will present unique challenges to the trainer.

THE BENEFITS

While there is a learning curve to adopt any changes in an organization's operations, it's compulsory in today's economy to be competitive and have a knowledgeable and well-trained workforce.

A balanced and blended strategy is the most popular delivery system. It might include several learning technology design and delivery methods, including short and focused e-learning courses combined with three- to five-minute video segments; brief webinars complete with performance support and job aids; and cloud-based tools used to assemble, share, and track learning content.

FOR EMPLOYERS

The paperwork and time needed for administrative activities is reduced for employers. Training can be delivered to trainees rather than requiring them to come to a central training location. In addition, employees' accomplishments during training can be monitored. Companies could turn to blended training to build employee loyalty.

In addition, organizations that adopt strategies using technology are positioning themselves to attract the best talent and ensure their people get the right training when they need it.

FOR EMPLOYEES

Employees increasingly expect technology to be available to them at work, so learning and development teams must incorporate technology solutions that are current and forward thinking. Younger generations in particular prefer to use the same technology for professional purposes as they do in their personal lives.

Using technology, employees can gain control over when and where they receive training. They can access knowledge and expert systems on an as-needed basis. They can choose the type of media they want to use in a training program. Moreover, the learning environment can look, feel, and sound just like the work environment.

THE BLENDED BIG PICTURE

Overall, blended learning leads to effective training. As new technologies emerge, online training is becoming a more reliable and effective delivery mechanism. Online courses are more robust, relevant, and engaging than ever before, ensuring an environment that promotes learning.

With various training modalities available, trainers can create the most suitable combination for each training project. Blended training also offers just-in-time learning and continuous learning over time.

The structure of blended learning improves consistency, and prepared materials can be made available for download. In addition, courses can be taken precisely as needs arise. Finally, from an organization's perspective, costs per learner are typically less than instructor-led training, training time is typically reduced, and retention typically improves.

Blended learning is an approach whose time has come.

4

The Multistep Training System Model

Part II of this book provides a process to design and develop training programs. The multi-step training system model is an easy-to-use guide that will help in all types of training programs. The purpose of establishing a training system in an organization is to ensure you design programs that:

- respond to the organization's business needs
- are educationally sound
- have measurable product learning.

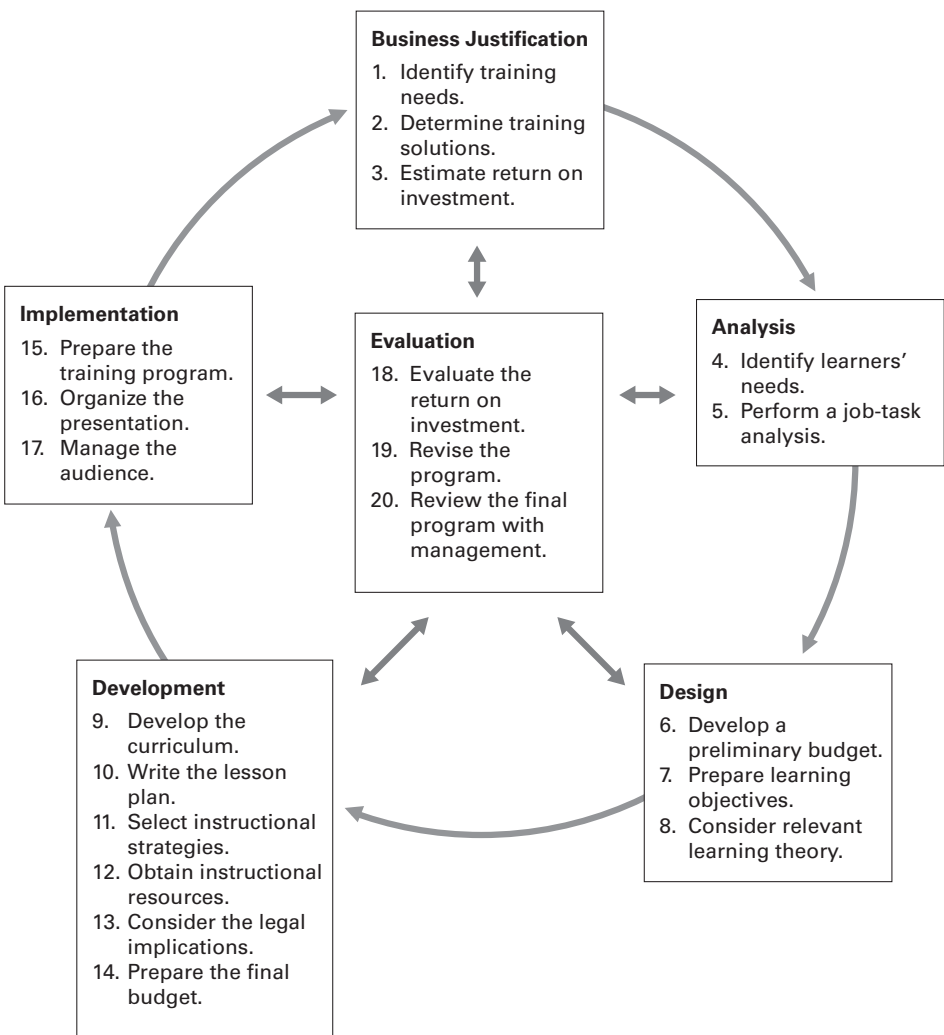
THE TRAINING SYSTEM MODEL

Use the training system model, as shown in Figure 4.1, as a guideline for developing new training programs or revising existing training programs. The six-stage model—business justification, analysis, design, development, implementation, and evaluation—follows a systems approach to planning, preparing, conducting, and evaluating training programs. Each stage involves specific techniques from the field of instructional technology. For example, the information you obtain through a needs analysis becomes the starting point

for obtaining job analysis data. Then you use the information you obtain from the job analysis to determine the instructional objectives.

By following the multistep training system model, you will be on the road to providing successful trainings.

FIGURE 4.1. TRAINING SYSTEM MODEL



The model addresses three questions critical to any training program developer:

- What content should I include?
- How should I teach and deliver the content?
- How can I ensure that the training is working (that is, did trainees learn the content)?

STEPS OF THE TRAINING SYSTEM MODEL

The training system model has 20 steps. There are three steps in the business justification stage, which are outlined in chapter 5:

1. **Identify training needs.** Conduct a preliminary needs analysis. Determine the kind of performance problems the organization is experiencing. Find out who thinks these are problems and why. Use observations, questionnaires, interviews, tests, work samples, and records to help identify the training need.
2. **Determine training solutions.** Training does not solve all performance problems, and you must first determine if training will solve the problem that management believes exists. A thorough analysis of the needs will help to determine whether training is the solution for the performance deficiencies.
3. **Estimate return on investment (ROI).** The process of measuring ROI should be simple, economical, and credible. It should also be theoretically sound, flexible, and applicable with all types of data, including hard data (such as output, quality, costs, and time) and soft data (such as job satisfaction, customer satisfaction, grievances, and complaints).

The analysis stage, chapter 6, has two steps:

4. **Identify learners' needs.** Collect data on the needs of individuals who are or will be performing the tasks. Production records, performance appraisals, supervisors, and employees can provide the information needed to identify learners' needs.
5. **Perform a job-task analysis.** Once it is determined that training will solve the performance problems, analyze all the tasks that are required to perform for particular jobs.

The following steps are in the design stage, chapter 7:

6. **Develop a preliminary budget.** Estimate the costs to decide whether to design or buy a training program.
7. **Prepare learning objectives.** Objectives are specified statements of what learners will do or know upon completion of the training program. These help to define the content of the training program and ensure that the tasks required to perform are included.
8. **Consider relevant learning theory.** Different theories explain how people learn, which occurs internally and can be inferred.

The development stage, chapter 8, has six steps:

9. **Develop the curriculum.** The written documents should reflect the interaction of content, sequence, instructor's experience, learners' experience, and the organization's expectations.
10. **Write the lesson plan.** Include in the lesson plan the learning objective, content, instructor and learner activities, test items, and enabling knowledge in the lesson plan. Also include the delivery method, such as face-to-face, virtually, or asynchronously.
11. **Select instructional strategies.** Strategies range from audiovisual equipment to a variety of group learning techniques. The lesson plan may need to be revised after selecting instructional strategies.
12. **Obtain instructional resources.** After completing the first draft of the training program, designers must make plans for the physical, financial, technological, and human resources needed to conduct the program.
13. **Consider the legal implications.** Before pursuing the training in earnest, designers must check for possible violations of the law that the training program might create. These include copyright infringement and equal employment opportunity laws.
14. **Prepare the final budget.** The final budget is a complete estimate of training costs that is presented to management.

Implementation, chapter 9, has three steps:

15. **Prepare the training program.** Organize the content of the learning module. Learn about the audience and venue, and select the materials and format.
16. **Organize the presentation.** Plan your presentation, choosing to follow the theory or skill session model and writing the body, conclusion, and introduction. Select the method of delivery, including the visual aids.
17. **Manage the audience.** Monitor the learners' reactions, and gauge their interest as you speak. Modify your presentation to be sure they remain in tune with you.

The final stage, evaluation, is outlined in chapter 13 and has the following steps:

18. **Evaluate the return on investment.** Has the training improved performance such that the organization's overall economic picture has improved? Measures such as sales and absenteeism can be tied to training.
19. **Revise the program.** Throughout the training program, obtain feedback to refine the program to best meet the learners' and organization's needs.
20. **Review the final program with management.** Management support must follow through well after learners complete the training program to ensure that the training had the desired results.

Although each chapter is self-contained and is designed to provide specific skills and techniques, as dictated by the 20-step training system model, in practice a number of questions and needs do arise with the development of a training. The toolkit, Part III of this book, provides tools and techniques that respond to frequently asked questions and to tool needs. A review of the toolkit can add competence to your practice.

SUMMARY

This chapter presents the 20-step training system model that will guide you through the various stages of designing and developing your training program. The steps are sequential and start with the critical first step of defining the training need. Once you have developed a needs statement, you have established a clear focus for building your training.

CHECKUP EXERCISE

1. What is the initial, critical step you must take to begin the training design and development process?
2. How many steps are involved in the multistep training system model?
3. What is the rationale for using a structured design process for creating your training program?

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