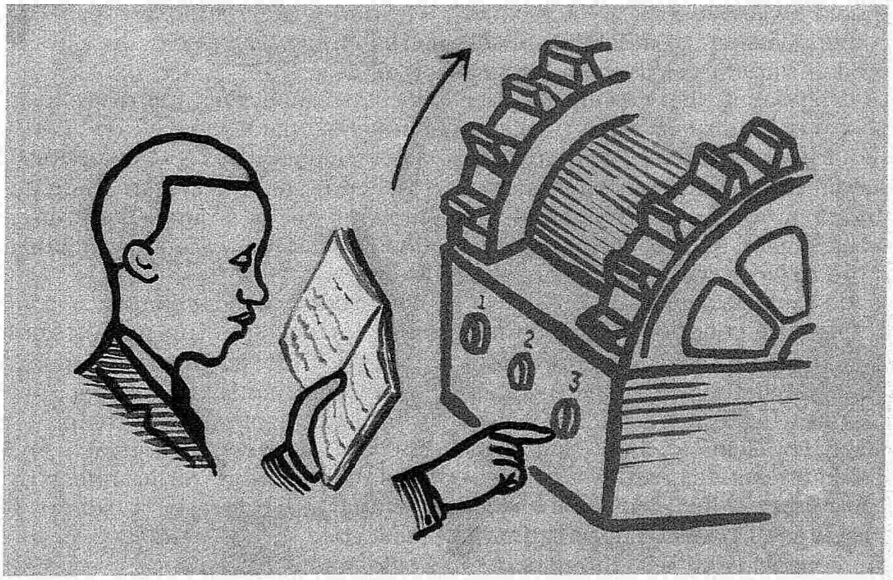
Training 101

THE WRITTEN WORD

The British-born novelist P.G. Wodehouse once described writing in this way: "I just sit at the typewriter and curse a bit." Some trainers have similar reactions when they have to write on the job. But the kinds of writing trainers do are really not that difficult—with a little practice.

This month's "Training 101" authors look at three different kinds of writing for HRD professionals.

First, Gerald Irving discusses three key elements to user documentation that trainees will really use. In the second article, Shawn Doyle looks at a very different kind of training "literature": flipchart writing. Doyle's 10 tips cover the mechanics of putting pen to flipchart paper in ways that will grab trainees' attention. Last, Robert Inguagiato looks at another common writing assignment for trainers: case studies. His five-step approach can help you develop behavioral case studies that provide learners with true-to-life opportunities to practice new skills.



Brian Cairns

When trainers write well, employees learn more from user manuals, flipcharts, and case studies.

Three Secrets of Good User Documentation

Capable, confident trainers often break into a cold sweat when they hear that they have been assigned a new responsibility: creating user documentation. User documentation is all the written information that shows employees how to operate their new computer systems, software, or manufacturing equipment.

The negative reactions are easy to explain. Most trainers recognize good documentation when they see it but are at a loss to define the ingredients that go into it. But one ingredient alone makes for good documentation—clarity.

A clear document is based on three key elements:

- good understanding of what the user needs to know
- good organization
- good writing.

Knowing what's needed. Before you begin writing, think about the scope of information the user really needs in order to do the job. User documentation should contain concise information on how to make a product work. Period.

For example, a user can become an expert on a software package without knowing how or where it was developed, how the developers managed to get so much power and use so little memory, or how carefully the software company researched the marketplace. Writers may be tempted to include such material. But information that does not make using a product easier does not belong in a user manual.

Everything in its place. Presenting essential information in a manner that is easy for the user to follow requires good organization, the second key element in writing effective documentation. Keep in mind three rules for clearly organized writing:

- Identify major points.
- Group information logically.
- Separate items for ease of comprehension.

The first place you'll identify your major points is in the documentation's table of contents. The reader should be able to look at the table of contents for an overall sense of the product and the relationships among its components. For example, a user of a particular software program should see at a glance that creating subdirectories is merely one function under the broader category of file management. A clear, well-organized table of contents can enable that kind of understanding.

Organize your documentation into logical groupings of information. Place similar items together. Discuss routines from start to finish in one place. For example, if entering financial information is part of a contract-entry process, then include the steps for entering financial information in the contract-entry section rather than placing it in customer finances only.

By the same token, separating certain items can aid reader comprehension, even if those items are related. For example, you may want to discuss lengthy but infrequently used procedures under their own heading, not under the same heading as common procedures. If a rule has numerous exceptions, it might make sense to list them in a section for exceptions, rather than integrating them into the explanation of the rule itself.

Good organization also includes good presentation. Format pages for visual appeal. Allow wide margins, make the headings stand out, and leave a lot of white space.

Writing it right. The final element in good documentation is, of course, good writing. Good writing is a result of the first two elements—organization and an understanding of the user's needs.

The best writing is based on clear thinking. Clear, effective writers make proper connections between related ideas and are careful to break misleading connections. For example, if the job code is a subset of the function code, then plainly state that relationship in the user documentation. Don't assume that the user will understand the connection simply because the job code is discussed immediately after the function code. And if there is no relationship between two items, then state that as well. It is best to avoid any possibility of confusion in the user's mind.

Good writers choose consistent terminology. If you use the phrase "type of service" in section 1 of the documentation, then use that phrase throughout the document. Don't suddenly change it to "service options" in section 2. Variety can spice up certain types of writing. But in user documentation, variety can muddy the water.

Of course, good writing must contain correct spelling and proper grammar. But spelling and grammar are the mechanics of writing; software is available that can help find and even correct such errors. And perfect spelling and grammar by themselves never made a bad document good.

So, trainers, save your sweat. The prospect of writing user documentation doesn't have to inspire fear. Insist on incorporating the three key elements that can make a document clear. The resulting user documentation is likely to be some of the best around.

— Gerald Irving
2931 Charlotte Avenue
Easton, PA 18042
(training consultant
M.F. Smith & Associates)

Ten Tips for Fabulous Flips

Most trainers use flipcharts every day. But we don't think much about them. Do we use our flipcharts effectively? How could they be better? Here are 10 tips and techniques for better flipcharts.

1. Color is by far the most overlooked option on flipcharts. Make flipcharts colorful. Use bright, "hot" colors such as magenta, turquoise, and aqua. But never use more than three colors on one flipchart—it's too distracting. Pick three colors that go well together; alternate their use. Your local art supply store can help you with color selections.

One last caution: Avoid pale colors such as yellow and all pastels—they are hard to see from a distance.

2. Wouldn't it be nice if you could reuse the same charts over again? You can. Here are several options:

- If you have a limited number of charts, frame them in clear plastic frames and use a grease pencil to check off major points. After the session, you can wipe off the pencil marks with a soft cloth.
- Cut long strips of acetate (transparency material), and glue or tape them to the flipchart pages in the areas you will want to mark on. Again, use a grease pencil so that you can wipe off your in-class work. The acetate strips are not visible from a distance.
- Take your flipchart pages to a laminating company and have them laminated. This creates a slick, erasable surface.

3. If you can't draw or don't have the time to, don't worry. The solution is at your local art-supply house, which probably stocks hundreds of clip-art books. The inexpensive books contain thousands of public-domain illustrations, usually arranged by category. Find an illustration you like, photocopy it to the proper size, and glue it to the chart. You have instant artwork! But be careful about trying to enlarge such artwork too much; expansion can distort the images.

4. Wouldn't it be interesting if you could use color photographs on your flipcharts? Well it is possible—with a little ingenuity. Choose the photo-

Ten Tips for Flipcharts

Spice up your flipcharts with color.
Reuse flipcharts.
Add clip-art to your flipchart.
Use photographs.
Include computer graphics.
Use stick-on and rub-on letters.
Strengthen flipcharts with foamcore.
Use templates as drawing tools.
Jazz up flipcharts with pinstripes.
Be creative!

graph you want to use, and have it enlarged to the proper size. Then, make a color copy of it at your local copy store. Glue it to the chart. You can make as many copies as you like and never worry about damaging the original.

5. Computer graphics is a an area that wouldn't seem to apply to flipcharts, but it can. Numerous graphics programs are available for all kinds of computers. Some have clip-art figures; others allow you to custom-design art. Once the graphics are complete, you can print them out—and paste them onto your flipcharts. If you can't print them out in the size you want, enlarge them on a photocopier.

6. What about lettering? Your local art-supply store has a plethora of stick-on and rub-on letters in every size, typeface, and color. You can easily apply these letters to your flipcharts for a professional look. The only disadvantage is that their use requires some skill and is time-consuming.

Experiment with different letter sizes and styles to see what is the most visible. As a rule, it's a good idea for flipchart text to be at least an inch tall. Avoid putting too much copy on your charts; keep them simple and easy to read.

7. Strengthen your flips with foamcore, available at art-supply and framing stores. Foamcore is a kind of foam with paper laminate on both sides. Foamcore is strong, lightweight, and economical. Trainers can use it in several ways:

- For mounting flipcharts, simply use a spray adhesive and attach the flipchart page to a piece of foamcore.
- Because the surface of foamcore is paper, you can produce the flipchart on it directly, one page at a time.

8. Many different templates are available to help you draw letters, squares, circles, curves, and other shapes. You simply put down the template, trace the cut-out area, and lift off. The use of templates does take some practice and can cause smudging, but it creates a nice, professional look.

9. Pinstriping can really jazz up a flipchart. It's available in many shapes, styles, and colors. Most kinds come in rolls and can be easily

applied to the paper.

10. Finally, let yourself be creative when making flipcharts. Consider using crayons, glitter, watercolors, or fabrics. You are limited only by your imagination, so experiment!

If you are more creative with delivering your message, the interest level will be increased and so will your students' retention level.

— *Shawn L. Doyle*
initial training coordinator
Dart Container Sales Company
2101 North Andrews Avenue
Sunrise, FL 33323

Case Studies: Let's Get Real

Generally, an organization has two choices when it decides it wants a behavioral-skills program: design its own or purchase one off the shelf. In either case, customization to reflect organizational issues and the realities of day-to-day life can mean the difference between a mediocre program and a powerful training experience.

The power of a well-written behavioral case study can create a virtual reality for the participant. A behavioral case study can reflect the organizational realities in which a participant lives, including all the challenges and issues a participant faces on a day-to-day basis.

For some trainers, writing behavioral case studies is an art; for others, it is a mechanical procedure. The artistic approach can produce wonderful results, but it can also make it difficult to transfer the creativity to other trainers. The mechanical approach tends to produce average cases with average results.

A third approach is possible. It provides a template for a trainer to follow but requires the trainer's personal creative touch to make it come alive. This approach has five steps:
- identifying a case goal
- establishing a case objective
- collecting general background information
- characterizing each case-study member
- depicting the organizational culture.

Let's look at each of the five steps in detail.

Identifying a case goal. Identifying the goal of your case creates the foundation for case development. Goal identification helps you be clear in your own mind about the kind of information you can collect during the interview process.

Here are just a few examples of the kinds of case goals you can identify before you begin to develop your case:

- to resolve a problem
- to influence someone to do something
- to negotiate an agreement
- to uncover the cause of a problem
- to enlist support or commitment.

Establishing a case goal at the beginning of your data-collection process will provide focus and clarify the interview process. If you lack a clearly defined case goal at the beginning of the development process, you run the risk of wandering "all over the map" during data collection.

Establishing a case objective. Establishing the case objective creates the playing field on which your behavioral case will be played out by course participants.

A case objective has four components.

The first component identifies the sectors of the organization that each case will depict, such as the marketing, manufacturing, and engineering functions.

The second component identifies the people in the case study, by title if possible. Establishing a person's title for a role in a case study creates an image in a participant's mind that helps bridge the chasm between paper and reality.

The third component explains why these people are having a meeting or conversation. What situation has caused this encounter to take place? For example: "A marketing specialist has requested a meeting with the marketing manager to discuss and clarify the marketing specialist's job responsibilities."

When the three components are put together, the result is the case objective. Here's an example:

"There will be a meeting between an area marketing manager and a marketing specialist. The marketing specialist has requested the meeting to discuss and clarify his or her job responsibilities. The marketing specialist wants to influence the manager to widen the scope of his or her responsibilities."

Collecting background information. General information must be obtained on each person in the case study. The following questions can yield some useful information on each character in the case:

- How much education does this person have?
- How old is the person?
- How much time has she or he been with the organization?
- Describe past work experiences.
- Describe his or her current job responsibilities.
- How many direct reports does he or she have?
- Who is this person's manager?
- What is the objective of this person's job?
- What job is this person striving for next?

It is not necessary, and at times it is not even advisable, to *describe* all nine of those characteristics for every person in every case study. But in your data-gathering phase, it is advisable at least to *collect* the information; later, you can decide which components to include in the case write-up. Remember that it is easier to edit information out of your research than it is to go back to your sources for another round of information gathering.

Characterizing case-study members. It is necessary to add life to each character your case study shows, beyond the simple demographics covered in the general background information. Descriptive information can help your case-study characters come alive, and may help engage the participants who will be portraying them.

For example, consider the job pressures each person in your case is experiencing. Look at such constraints as increased production, cost reductions, budget restrictions, and peer pressure.

Consider the personal pressure each person is experiencing. That could include an ill spouse, money problems, or conflict between career goals and personal goals.

Explore the history of the relationships between the people in the case meeting. Are the relationships good, strained, or bad, and why? How long have the people worked together? What have they heard about each other through the rumor mill?

Each person may have a hidden agenda for this meeting. Find out what it is. For example, hidden agendas may involve looking good in front of a supervisor, maintaining control of a department, and improving job-promotion opportunities.

Ask why each person might consider working toward a successful outcome in this meeting. What is in it for each member?

The people in the case meeting might be able to offer something to each other in return for cooperation. Consider such possibilities. For example, one person might be willing to put more resources toward solving a problem, in return for information she or he might not receive through normal, day-to-day interactions.

Describe the reasons why each person might resist working toward a successful outcome in this meeting. What would motivate each person not to cooperate? Consider lack of trust between some of the people, a clash of styles, and a loss of control. This description will also provide data on points of tension between the different people in the meeting.

Explore the personal values of each of the case members. Conflicting values could cause misunderstanding or resentment. For example, one person may believe it is good to be candid and direct, while another case member believes that circuitous feedback is more polite and sensitive. Or one person could place a high emphasis on conflict avoidance or team development, even at the expense of individual production.

Again, it is not necessary to include all this information in the case write-up. But we all face such conflicts; a training designer with background knowledge of those kinds of conflicts can make cases more real to participants. And reality is what permits participants to relate to the information contained in behavioral programs. It also increases the chances that participants will put their energy into doing the best job possible in participating in cases, rather than just going through the motions.

Depicting the organizational culture. For a realistic case exercise, the trainer should first set the stage in which the case meeting will take place, describing some of the characteristics that make an organization unique. Information on the organizational setting will heighten participants' sense of reality throughout the case study, so that they can practice behavioral skills in a setting that is only a short step from the actual world they work in.

Provide a short description of the organizational values or current points of emphasis. For example, the organization may have started a high-profile push to improve interactions between employees and suppliers.

Next, include a short description of any sources of external pressure. For example, a company might face competitive pressure to do the job right the first time, or might have recently lost more than the average number of key employees to other organizations.

Also provide a short description of any time perspective that could influence the setting for the meeting being described in the case. For example, this might be the ninth time this particular problem has developed between these two departments. Or perhaps employees have heard this emphasis on quality once too often this year.

Too many of the case studies used in training programs distract participants rather than engaging them. The trainees' energy goes into the all-too-familiar battle cry, "these situations you want us to practice are not relevant to our jobs." One of the benefits of customized behavioral case studies is that participants can instead put their energy into acquiring and practicing the behavioral skills you are teaching.

— Robert J. Inguagiato
8202 Pinon Place
Bozeman, MT 59715

"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.*