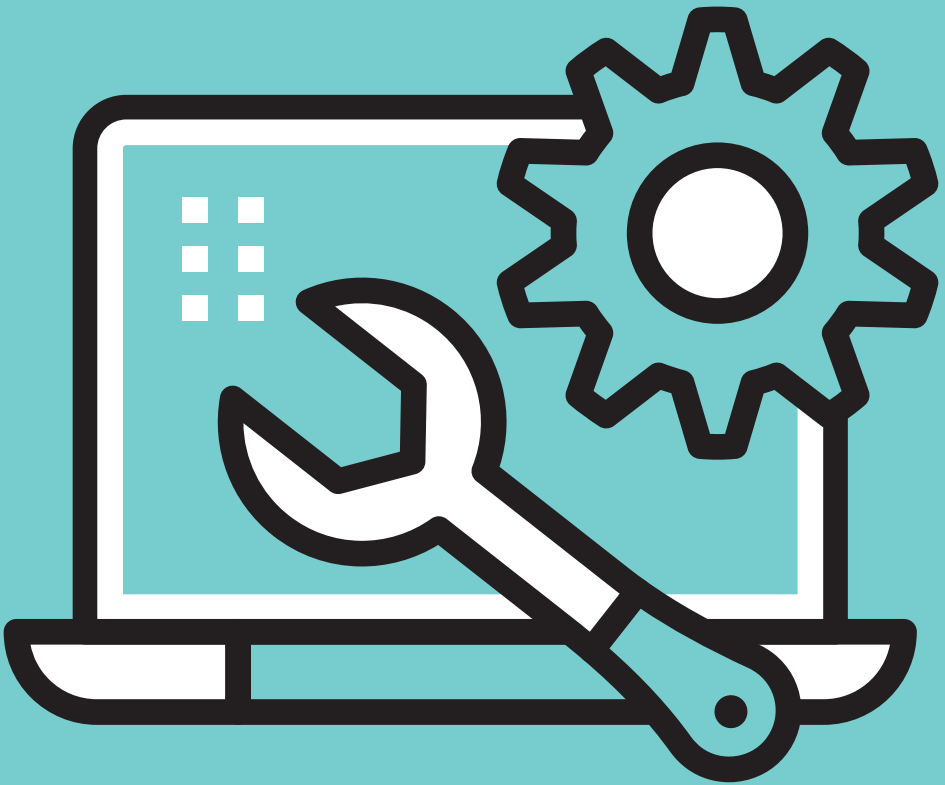


Troubleshooting for Trainers



Sophie Oberstein

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Introduction

Twenty-something years ago, I arrived early to set up for my first training program in my first L&D job, which was at an international retail bank. I was so excited to finally be officially working as a trainer, even if banking wasn't an industry I'd previously had any exposure to. So I was also nervous as I set up for this session, which focused on new software the bank was introducing. Upon arriving, I turned on and tested all of the computer terminals, hung up some flipcharts, put out name tags and participant materials, and tested my computer demo in the front of the room. I'd rehearsed several times and I was ready when participants came in and took their seats.

The first activity I conducted was to go around the room asking each participant to share their expectations for the program. As individuals described what they hoped to get out of the session, I charted their responses so that we could revisit their expectations at the end to see if they had indeed received what they'd hoped for. All was going well, until I asked a man sitting near the back of the room with his arms folded across his chest.

"Honestly," he started, "I have low expectations for this course. What can you—a young, inexperienced person—teach someone like me, who's worked at this bank for more than 20 years?" My heart, which was already racing, went into overdrive. I didn't know what to do or how to respond. *He's right*, I thought to myself. *I am less experienced than he is. I don't really know what I'm talking about. I only know what I learned about the system when I was being prepared to lead this session. Can I pull this off?* While panicking inside, I managed to keep my composure and say something to the effect of, "Hmm. If you don't mind, I'm going to just write it here on the flipchart and we can come back to it at the end of the session, to see how you're feeling about it then." I added

to the list something like: “I don’t expect to learn anything from an inexperienced trainer.” Then I moved on to the next participant.

I don’t remember any particulars of the remainder of that session, but it must have gone well enough, because at the end of the class, I went back to the flipchart and went item by item down the list to see if people’s expectations had been met. When I reached this gentleman’s contribution, I asked him, “How’d we do in this area?” He rather sheepishly told me his concerns had not been warranted. Phew! I’d successfully exceeded his expectations. Would I have responded the same way today? Not at all. Look for my current response in **Section 1**.

That’s my story about the make-or-break moment I wasn’t prepared for. I made it through, but how I would have loved a guide in my first few months (or years) in the L&D field to turn to when I fell into situations like that one and others that arise for anyone new to training.

That’s what this book is: The troubleshooting guide experienced trainers wish they’d had when starting out. Like a troubleshooting guide that’s part of the operating manual for a new appliance that has started acting up, this book will provide you with in-the moment fixes and longer-term solutions for some of the common challenges faced by new trainers at every stage in the L&D process.

This book does not go deep into the fundamentals of learning design or the basics of face-to-face or online training delivery. Plenty of other authors, books, and workshops delve deeply into those topics, and I’ve listed many of them throughout the book. Instead, this book is problem- and solution-centered. Pull it out when you’re in a predicament, flip to the related challenge listed in the table of contents, and find some immediate solutions. Better yet, use it to find troubleshooting tips and strategies to help you proactively avoid the crises new trainers face.

I’ve collected the challenges addressed in this book from new trainers I’ve spoken to at ATD Core 4 conferences, from the Learning Design: Fundamentals class I teach at NYU’s School for Professional Studies, and over the 20-plus years I’ve coached and mentored people entering the field. In each section, I’ve included some quotes representative of the situations these new trainers have faced, and I’ve labeled them as “The Problem.” Solutions come primarily from my own experience, and they are supplemented by literature in the field and discussions with my colleagues. They are organized by section:

Section 1. Lack of Credibility: Building trust and assuring people you add value when you lack experience is a major issue for those just starting out in any field. Challenges in this section include things like being “sidelined” into a training role and not yet seeing yourself as an L&D professional, and how to know what’s a passing fad as opposed to a long-lasting trend.

Section 2. Training Isn’t Well Regarded: Like other organizational support functions, L&D is sometimes misunderstood or less visible. In addition to making learners throughout your organization aware of the resources you can provide, you must demonstrate how training adds value. Challenges in this section address issues like when no one is signing up—or showing up—for your courses, and knowing how to get a seat at the table as a valued business partner.

Section 3. Lack of Resources: New trainers work in a variety of departments. Some are on large teams, where they maybe focus on one aspect of learning design or delivery, while others work on teams of two or three people, where they handle all aspects of L&D projects. Some are even training departments of one. I’ve worked in all of these environments—at Citibank with a training team of 40 or more people, at Weight Watchers with a team of about a dozen field trainers and four or five designers and administrators, and at Redwood City, where I was the entire training team. I’ve had to be creative with resources in all of these situations. Challenges in this section revolve around lack of money or people power.

Section 4. Limited Learning Design Experience: The Center for Creative Leadership famously asked effective organizational leaders how they’d learned what they needed to be successful. Their time-tested 70-20-10 learning model emerged from more than 30 years of research, where the 70 percent (though many professionals now consider it closer to 50 percent) represents experiential learning. Most new trainers are also left to learn how to perform their responsibilities through experience. To put it another way, they are “thrown to the wolves” to figure things out for themselves. Many new trainers I’ve spoken to mention a feeling of loneliness as they tackle challenges that they are sure someone else somewhere has already faced. This section provides tips for getting started with some common projects like finding content, converting classroom training to e-learning, curating learning experiences, and making sure people apply what they learn in training back on the job.

Section 5. Uncertainty Around Measurement: Tracking and reporting on metrics is a core requirement of most organizational functions today. L&D is no different, except that sometimes what you are tracking is harder to quantify and measure, especially when you don't own the data that you wish to track. This section responds to that situation, as well as describing how to construct valid, reliable assessment tools.

Section 6. Live Training Surprises: The *2019 State of the Industry* report from the Association for Talent Development (ATD) indicates that classroom training is still the most popular methodology for workplace development. Many new trainers start out in the classroom or facilitating live online workshops. In real-time settings like these, a lot can go wrong. That's where a troubleshooting guide can be especially helpful. This section addresses awkward situations you might face during synchronous training events like limited time and limited seats, technology that doesn't work, participants who aren't engaged or look lost, and questions you don't know the answers to.

Section 7. Challenging Participants: One of the joys of providing live training is the ability to interact with people and help them achieve success. You get to be there for their aha moments and when they get past a struggle to learn something that will help them in their job and life. Yet among the participants who are a joy to interact with are some who are less so. This section provides tips for handling challenging participants, including the monopolizer, the rambler, the late-comer, and the quiet type.

Each section contains a number of challenges. Each starts off with a brief description of why this is a challenge for trainers, a series of solutions for overcoming it, and some resources to go deeper on the topic. Some challenges end with tools and samples.

I hope that in these pages you will find support, and that you'll develop confidence and enhance your skills as a new trainer. Welcome to learning and development!

Acknowledgments

I am grateful to the people who were, in essence, my troubleshooting guide when I started out in the field of learning and development so many years ago. They include Stephanie Nickerson and Joanne Polichetti, instructors in my master's program at the New School for Social Research; Carolyn Hoffmann, Alan Richter, David Hertz, and Steven Katten, mentors from some of my first internal and external training roles; and Maureen Kerr, Eric Loffswold, Kathy

Zukof, and Aaron Viera, who have been excellent sounding boards and partners in recent years.

Even after 20-plus years in the field, there is always more to learn, and I'm delighted to be learning it alongside the amazing team from the Center for Leadership & Organizational Change at the University of Maryland. This book is better because of your generous and thoughtful suggestions and the wonderful examples you provide on a daily basis. You rock!

I truly love passing along what I've learned on my journey to those who are just embarking on theirs, and am so thankful for two opportunities in particular to do this. First, I want to thank the team at ATD that offered me the opportunity to write this book—and made it such a pleasure to do so—Eliza Blanchard, Jack Harlow, Caroline Coppel, and Melissa Jones, as well as Kay Hechler and her amazing marketing and communications team. Second is the team at NYU's School of Professional Studies, which allows me to continue teaching the Learning Design: Fundamentals course, especially Chantal Gomes, my go-to in the department. Thanks, of course, to all my former students and to those learning and development professionals who shared their experiences with me and whose thoughts are dispersed throughout the book.

Finally, as always, I dedicate this book to Lily and Evan. Somehow, even without a troubleshooting guide, I've raised two wise and accomplished adults who continue to inspire and teach me. I feel so fortunate to be your parent. And to my co-parent and love of my life, Jeff, thanks for your acceptance, which allows me to continue to write books and not make dinner.

Sophie Oberstein

October 2020

SECTION 1

Lack of Credibility

The Problem

- ⚙️ “I think things are going well in my new training role, but I’m not really sure if what I’m doing is right. I’m mostly going by my gut because I don’t have a background in this field.”
- ⚙️ “I was asked to become a trainer because we have a lot of turnover and someone needed to get the new hires up to speed. It was treated as if it were some sort of honor to recognize my contributions to the team, but it’s not necessarily a role I expected to have when I started my career.”
- ⚙️ “I started out as a manager in my industry, so I was used to being a subject matter expert with credibility in the field. But when I became a trainer, and then changed organizations, I had to prove myself all over again.”
- ⚙️ “I’m not experienced enough to know if I should jump on the bandwagon when a new acronym or a new process comes along or if it’s just a fad.”

What's Happening Here?

Credibility is the quality of being trusted and believed in. No matter what field you are entering, it takes time to establish credibility because you are either new to the profession, or just new to the team, and you haven't yet proven that you—and your ideas—can be trusted. This may be compounded in the field of learning and development, because people don't always understand the role of a trainer or the value a learning professional can add. Some of the solutions described in this chapter are simply about performing your new responsibilities in a very visible way so that others can see that you are dependable and reliable, and that your work adds value. Many of the suggestions here apply just as well to other industries as they do to training.

In addition, to establish credibility with others, sometimes new trainers will need to trust and believe in themselves. Especially if you were “voluntold” to train others, you may not yet see yourself as a learning and development professional. The first few solutions in this section will help you in these situations.

By the way, a lack of credibility is what my new trainer story from the introduction was all about (when a participant asked me “What can you—a young, inexperienced person—teach someone like me, who's worked at this bank for more than 20 years?”). While my solution at the time seemed to have worked, it's not what I would have done in hindsight. First off, as a more experienced trainer today, I'm more aware going into a program of what potential challenges I may face, and I address them head-on. For example, I might have started off that session by introducing myself and then making a comment to the effect of, “You may be wondering how someone new to banking like me might be able to lead this session. Well, first I went through three weeks of systems training on this new process. Then I spoke to Miguel Cortes, who designed the new system, and who gave me some additional tips and insights. I'm excited to share with you today what I took from that training and from my meeting with Miguel.” If, despite that up-front explanation, the concern had been raised anyway, I would have thanked the person not only for being honest, but also for being brave enough to say something that, if it was on his mind, was probably also on other people's minds. Then I would ask if others felt the same way and would lead a brief discussion on what we could all do to get comfortable with the idea of my facilitating the session. In that discussion, I might have simply asked participants to try to put their trust in me, and in

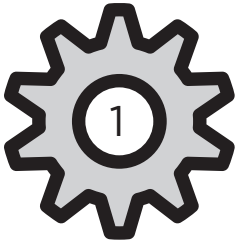
return, I would try to deliver the most informative program I could. My actual response—writing his concern on a flipchart and moving on—was not only insensitive; it also ignored a factor that could have negatively influenced this gentleman’s learning, as well as that of others in the room.

If you’re feeling like people might question your credibility in or out of the classroom, address it proactively and understand that it’s a natural reaction, because it takes time to rely on and appreciate another person. If you’re questioning your own credibility, remember that we were all starting out at some point, and now some of us are experts. Be patient, because that time will surely come for you as well.

The Challenges

This section provides troubleshooting tips for the following issues related to a lack of credibility, which can be found on the pages indicated below:

Challenge 1. I’m a _____, not a trainer.....	5
Challenge 2. I’m newer and less experienced in this role	9
Challenge 3. I don’t have any influence over learners or stakeholders.....	17
Challenge 4. I don’t know what’s just a fad	23
Challenge 5. I’ve never managed a training project before	27



Challenge: I'm a _____, not a trainer

Description

You're an "accidental trainer." You've been chosen for a training role even though you don't have a background in adult learning, instructional design, or organization development. You were chosen to train others because you've performed your own job so well, successfully mentored or onboarded other employees, or delivered some awesome presentations on a topic. For whatever reason, you've been thrust into a training role, and you just don't see yourself that way—you may even be intimidated about doing training.

Solutions

If you don't believe in yourself as a trainer, it will be impossible for others to see you that way. Here's how to get comfortable with this new role.

Change Your Self-Talk

When we walk around saying to ourselves, "I'm not a trainer," we come to believe it. We internalize the message that this is not something we are good at—and our actions follow suit to reinforce that. Yet, as trainers, we often encourage our participants to embrace a growth mindset: to understand that the brain is elastic, so that even if you've been bad at something your whole life, if you put enough energy in and get the right instruction, you can become great at that thing. Research in neuroscience by Carol Dweck suggests that when you are told that growth matters and that you can improve, it happens. So, instead of telling yourself that you aren't a trainer, start replacing that message with, "I'm not a trainer *yet*" or "I'm great at ____, and I can also be great at helping others become great at it."

Fake It 'Till You Make It

The reverse of changing your self-talk so that you can change your beliefs and, subsequently, your actions is to first change how you act. Observe others whom you consider to be excellent learning facilitators, talk to people who

design effective training programs, watch talent development professionals—and emulate what they are doing. Once you are acting like a knowledgeable, capable, confident training and development professional, and others are responding to you as such, you will come to believe you are one.

Embrace Your Beginner Lens

As someone new to the training field, you add a lot of value by being able to put yourself in the place of a learner—because you are one. You may have mastered the content you'll be imparting, but you are learning how best to present it. You are in the shoes of someone who is new to something; you are someone who is on a learning curve. The learning curve, first posited by German psychologist Hermann Ebbinghaus (a name we'll come across a few times in this book), basically illustrates that the more someone performs a task, the better they get at it. So, while you continue to get better, remember the experience of being at the beginning. Sometimes a trainer who hasn't been a learner in a while cannot relate as well to someone at the bottom of the learning curve, or cannot present information in a manner suitable for beginners.

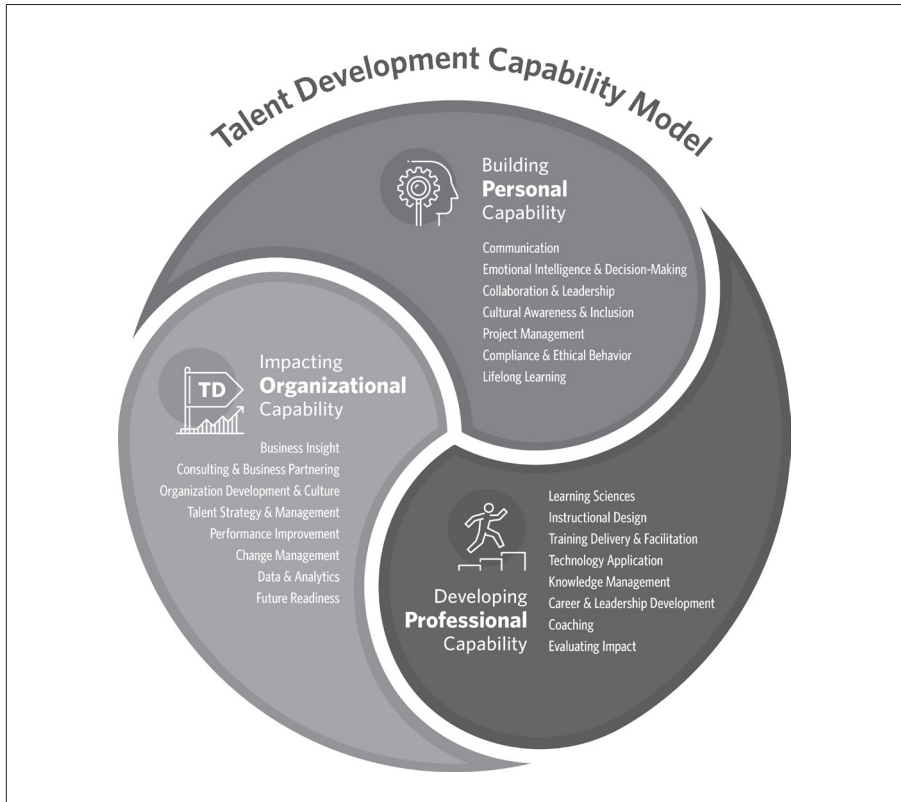
Recognize the Parameters of Your New Position

In writing this book, I spoke to several people who became trainers after having been effective supervisors. These trainers were all of a sudden in individual contributor roles and felt like they needed to recalibrate their entire purpose. Instead of being responsible for the performance of an entire team, for strategizing and creating, they were now simply doing tasks. If you relate to this experience, know that you are not alone and that it is temporary. One such individual told me, “As someone who was used to being around the strategic table with influence and voice in the major decisions in my department, it was a tough transition to now being an individual contributor whose expected impact was in the doing rather than the thinking and leading. This transition was tough because it made me question my abilities and placement in the organization, but I quickly realized that being back in the ‘doing and executing’ phase of influence was going to lead me to truly dig deep into this work and that with time, I would be back around the strategy table.” You may also wish to think about yourself being in a building role, rather than a leadership or strategic one. Developing and generating growth in others is as important as leading.

Evaluate Your Capabilities

You might not identify as a trainer or talent development professional, but you very likely have some of the knowledge and skills needed to be successful in that profession, and that's why you are asked to create and deliver training. Do you possess any of these skills: Do you communicate effectively? Analyze needs and propose solutions? Build trust? Have business insight? Network and partner? These are just a few of the critical capabilities included in ATD's Talent Development Capability Model (Figure 1-1).

Figure 1-1. ATD's Talent Development Capability Model



Review ATD's capability model and recognize where your capabilities match (there is a self-assessment included for those with an online ATD account). This can help you to embrace your role as a trainer one skill at a time. It can also help you to identify where you wish to improve.

Keep in mind that there are 23 broad capabilities spread across three domains and more than 189 knowledge and skill sets included in this model.

No one can be an expert on—or have passion for—all of them. We all have parts that compel us and that we’re good at. That is why certain areas of specialization within the field correspond to the different categories reflected in the model. For example, if you’re an amazing stand-up trainer, you might need to rely on your instructional design team or an external supplier to create engaging online learning. If you’re excellent at analyzing performance and evaluation data, you might not want or need to develop your coaching skills.

Bottom Line

You may not yet see yourself as a trainer, but keeping in mind that growth is possible and that you possess some of the key capabilities that trainers need will help you to flip from “I’m a ___, not a trainer” to “I’m a ___ *and* a trainer.”



Go Deeper

“Motivating Students With Mindset Coaching and How Brains Work” by Emily Diehl

People with a fixed mindset believe that intelligence and talent are fixed abilities and cannot be improved. With a growth mindset, people assume that with hard work and good strategies, we can always learn and grow. From this page, you can access articles related to growth mindset, as well as a questionnaire that helps learners to identify which mindset they hold.

“A Quick Summary of the Theory of Learning Curves” by Steve Wheeler

Hermann Ebbinghaus was probably the first psychologist to conduct experimental research into human memory, resulting in the concepts of a learning curve, a forgetting curve, and a spacing effect. This article is just what it claims to be—a quick summary of Ebbinghaus’s learning curve. It does include a link to a more extensive article and also, quite nicely, to a list of summaries the author has written of other psychologists (from A to Z) and their educational theories.

The ATD Talent Development Capability Model

ATD is the premier professional association in the field of talent development. From the page (td.org/capability-model/access), anyone can access the ATD Talent Development Capability Model, and members can complete a self-assessment.

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About the Author



Sophie Oberstein is an author, coach, adjunct professor, and L&OD consultant helping individuals who are seeking increased effectiveness and satisfaction at work. She's been in the field of learning and organizational development for more than 20 years at public and private organizations, including Weight Watchers North America; Columbia University Irving Medical Center; Redwood City, California; and Citibank, N.A.

Oberstein is on the faculty of the NYU School of Professional Studies, in the Leadership and Human Capital Management department, where she developed and conducts the fundamentals course in the learning design certificate program. She has also taught at Drexel University, Mercer County Community College, and Menlo College.

Her books—*10 Steps to Successful Coaching*, 2nd edition, and *Beyond Free Coffee & Donuts: Marketing Training and Development*—are available from ATD Press. Oberstein is a past president of ATD's Greater Philadelphia chapter.

You can reach her on LinkedIn at [linkedin.com/in/sophieoberstein](https://www.linkedin.com/in/sophieoberstein) or via her website at sophieoberstein.com.

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Your Fix-It Guide to Training



When you need to repair an appliance on the fritz, you can consult the instruction manual. But if you're stuck when designing or facilitating training, what resource can you turn to for solutions to your problem?

Part troubleshooting guide, part introduction to training design and delivery, *Troubleshooting for Trainers* delivers in-the-moment fixes and longer-term solutions for common challenges at every stage of the learning and development process. Pull it out when you're in a predicament, flip to the related challenge listed in the table of contents, and find some immediate relief. Better yet, use it to discover tips and strategies that will help you proactively avoid the crises new trainers face.

Covering more than 40 challenges, the book offers solutions for when:

- ⚙️ You feel a lack of personal and professional credibility
- ⚙️ You don't have enough resources
- ⚙️ Live training surprises throw you for a loop

Perfect for the busy trainer, each chapter briefly describes a challenge for trainers, offers a series of solutions for overcoming it, and includes some resources to go deeper into the topic.

Praise for This Book

"Wish I'd had *Troubleshooting for Trainers* when I started as a trainer! It would have saved me lots of time and anguish."

—**ELAINE BIECH**, Author, *The New Business of Consulting* and *ATD's Foundations of Talent Development*

"As a new trainer I am so relieved to have come across this book! It speaks to me and makes me feel supported with real-world examples, ideas, and useful resources."

—**MAYA MATALON**, Associate Director of Training, Video Interaction Project

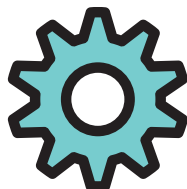
"Oberstein's extensive references combined with her decades of experience in the trenches give *Troubleshooting for Trainers* credibility and authenticity as a resource for managing the existential realities of learning and talent development in today's fast-changing workplaces."

—**JONATHAN HALLS**, Author, *Confessions of a Corporate Trainer*

"As someone just getting started with developing training programs within my organization, I returned to this book frequently for ideas, advice, and direction."

—**JULIA CROWLEY**, Chief Administrative Officer, Edge Technology Group

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