# Chapter 6

# A Five-Step Model for Creating Terrific Training Sessions

**Chapter highlights:**

▶ Six universal principles from learning research

▶ Model for structuring training

▶ Worksheets to guide and support application

▶ Means to retrofit existing training to the model.

**W**hat if we offered you a simple, easy-to-use training tool that significantly increased the probability of learning success with any group, of any size, on any topic? Would you want it? In this chapter, that's exactly what we present to you. No strings attached, no caveats, no maybes or sometimes. In a way, this chapter is the heart and soul of *Telling Ain't Training: Updated, Expanded, and Enhanced.* We're not diminishing the importance of the other chapters, but things do come together here. So, prepare yourself.

First, here's a brief review. In chapter 1, we set up some challenges to establish the central theme of this book: Telling ain't training. We also wanted you to immediately experience the style of this volume: fun, challenging, participative, and conversational.

Chapter 2 provided you with some basic vocabulary—training, instruction, education, and learning—and presented a focus, a mantra: "learner centered, performance based." It also stressed that the medium isn't the message and that the

content of this book applies to all forms of instruction, regardless of the delivery vehicle. In chapter 3, we visited the senses, the brain, and memory to acquire an understanding of the learning characteristics and limitations of our learners.

Chapter 4 focused on why we often have difficulty communicating our knowledge to our learners, even though we know a lot. It emphasized how differently experts and novices process information and described the fundamental distinctions between declarative and procedural knowledge with all of the inherent implications. Finally, chapter 5 provided a structured overview of adult learning and exemplified four key adult learning principles.

The stage now is set for building effective learning sessions. You have had enough information and argumentation to convince you that we require a structuring mechanism that differs from the one we observe in most work settings. Where do we turn for this? Once again, research on learning helps direct us.

## Six Universal Principles From Research on Learning

How would you classify yourself as a learner?

☐ more auditory
☐ more focused on details
☐ more visual
☐ more focused on the whole
☐ more social
☐ more right brain
☐ more independent
☐ more left brain.

When we observe individuals at work and play, we notice differences among them. Each person appears to possess a unique set of capabilities and traits that sets him or her apart. We naturally assume that they have their own *style of learning*. Also, our observations suggest that, ideally, we should tailor our learning sessions to each learner. Obviously, this is an awesome challenge and most likely not feasible, especially with so many learners and so few resources.

What then can we do? Must we compromise? Must we accept less?

We have good news and bad news to share with you, depending on your point of view. We have boxed each of them below so that you can self-select the one you prefer.

| The Bad News | The Good News |
|---|---|
| Sorry. We humans are not as unique as we like to think we are. Research in learning indicates that there are significant differences in the way individual learners are affected by different types of instructional approaches. However, the detectable differences in the research findings do not translate into a major overall impact on learning. We are alike in more ways than we are different.[1] | The good news is akin to the bad. As much as we would like to believe that each of us is incredibly unique, unless we have some form of perceptual or cognitive disability, we are all very much alike in how we perceive, process, store, and retrieve information. Well-designed and well-delivered instruction seems to have a broadly similar impact. This allows us to design sound instruction based on a universal set of principles and to achieve a high degree of effectiveness with a wide variety of learners.[2] |

Now that we have given you both the good and bad news, we arrive at a single conclusion: If we can derive some overall, "universal" principles from research on learning, we can mold them into a model for teaching most learners most subjects with a relatively high success rate. What are those universals? They make such good sense that they are almost embarrassing to share.

Here are six words that sum up a lot of findings from research on learning: why, what, structure, response, feedback, and reward. Let's examine each of them.

## Why

As reasonable as it may seem, if the learner knows "why" he or she is supposed to learn something and the reason makes sense to—is valued by—the learner, the probability of learning increases. This sounds similar to the readiness principle from the previous chapter. Readiness suggests that the adult learner learns more easily if his or her mind is open and ready to take in new information. The key is to show what's in it for the learner.[3]

Research in which different learner groups received instruction with and without a meaningful "why" produced different learning results. In the research studies, "why" is frequently represented by the terms "expectancy value" or "task value," referring to what the learners perceive investing in the learning effort offers them. Groups with strong rationales that convincingly explained how the learners would benefit from the instruction paid closer attention and retained what they

had learned more accurately. This appeared to be true regardless of the type of learner. The clearer and more meaningful the "why" offered, the better and more long lasting the learning.[4]

## What

There's an old saying, "If you don't know where you're going, you'll probably end up someplace else." This is true also of learning. Have you ever been in a class in which the instructor/teacher/professor wandered aimlessly through the course material? You sat there trying to figure out where this person was heading, and you felt lost. Research on learning demonstrates the value of clarifying to the learners what it is they will be able to do by the end of the lesson, module, or course. Such early information acts as a set of guideposts or a map. The clearer and more meaningful it is for the learners, the higher the probability they will learn it.

However, this should not be confused with provision of specific instructional objectives at the front end of a course when the objectives may be meaningless to the learners. Studies done on "specific instructional objectives," their use, and their placement in instruction had confusing and contradictory results.[5]

## Structure

Examine the array of symbols below for 15 seconds. Ready? Go!

$?$*#*$?£*£##?$?*££?*#£#$

Stop! Cover the array with a piece of paper.

Now reproduce the array in the same order in the box.

Done all you can? Compare the two arrays and give yourself one point for each symbol you placed in the correct sequence. The maximum number of points is 25.

Jot your score down here.

Now, repeat the exercise using the array below. Once again, you will have 15 seconds to "learn" it. Ready? Go!

$$$$$ ????? ***** £££££ #####

Cover the array and reproduce what you remember in the space below.

Then score yourself again. As before, you get one point for each symbol placed in the correct sequence.

Compare arrays. Enter your score in the box.

Let's examine the results. Did you do better in the first or the second trial? When we try this out with adult learners, we rarely discover scores above four or five in the case where the symbols are all jumbled up.

However, when these same symbols are placed in an easy-to-understand, structured order, most people score a perfect 25. Amazing! Same symbols (or content) and different structures produce dramatically different results.

Humans seek order. Where there is none, they will create it artificially. Think about gazing at clouds. Don't you see shapes in what are really random patterns? And what about the man in the moon? The research tells us that the clearer the structure of the content is for the learners, the more easily they will grasp and retain it.[6]

Here's one more example of this all-important structure issue. Imagine that we offered you $10,000 to name all the states of the United States without using any references or getting any assistance. One error, and you receive nothing. What would you do to be 100 percent sure you get all the states right? Check off the most probable strategy for you. If none fit, add your own.

☐ Just randomly name them as they pop into my mind.
☐ Use the alphabet as a guide and name them alphabetically.
☐ Break up the United States into regions and name states by region.
☐ Start on the east (or west) coast and name all the states in order down the seaboard and along the southern and northern borders. Then fill in spiraling toward the center.
☐ Use a rhyme, song, or other memory device to organize my recollection of all the states.
☐ My method:_____.

We have asked this of hundreds of adult learners. Every one of them selects some structured and systematically organized method. Not one person chooses to name them randomly. The need to bring order or structure to what we deliberately try to learn and recall is universal among all types of learners, although the nature of the structure can vary.

**Response**

The more learners actively respond to learning the content, the better they learn and retain it. Response can take the form of answering a question, filling in a blank, labeling something, solving a problem, making a decision, or even discussing and arguing. It can take any form that elicits an active response to learning the content. Before we share a little more about the research on active responding, here's a quick challenge. Check off your choice below.

☐ Learners learn better if the response they emit is out loud or written down—an overt response.

☐ Learners learn better if the response they emit is in their heads—a silent or covert response.

☐ Learners learn better if they respond. There is no significant difference between overt or covert responding.

Ready for what may appear to be the surprising answer? The correct one is the second choice. Almost everyone selects the first choice, but what the research shows is that active responding is the critical ingredient. What is also important is that the response be a meaningful one. We have seen so-called interactive e-learning in which learners move objects; click on items; and enter numbers, letters, and even words that have no meaning with respect to what they are supposed to be mastering. This is empty responding. It has some limited value in that it may maintain the learners' attention for a while, but it does little to clarify meaning or assist retention.

Examples of this, both live and mediated, are learning games in which the gaming aspect becomes so dominant that the learning content fades out. The response is about the game, not the content, and it ceases to be relevant or meaningful.

Here is a note on the research concerning active responding and covert versus overt responses. Most of the studies were conducted in the 1960s and 1970s. We decided to delve back into these to reassure ourselves about what we were affirming. Sure enough, the preponderance of research findings supports covert responding, mostly because the mental engagement compared favorably with some empty types of overt responding (for example, raising hands, clicking on something, or repeating text). Two conclusions emerge here. First, response must be meaningful. Second, there must be an element of reflection before deciding on a response.[7]

Concerning meaningfulness and its importance, think of yourself performing routine tasks in which you are responding but are no longer mentally engaged. Have any of the following ever happened to you? Check off those that you have experienced.

☐ You've driven for several minutes and then suddenly realized you were on "automatic" and can't remember what you've done or how you ended up on a frequently traveled route you didn't intend to take.

☐ You performed your morning routine (shower, shave/make-up, hair, and so forth), and then had to check whether or not you had put on deodorant.

☐ You studied for an exam and read several paragraphs or pages only to realize you can't recall a thing about what you've just read.

☐ You've been introduced to new people at a social event, smiled, shaken hands, and then noticed that you couldn't remember the names of the people you had just met.

☐ You finished your meal then couldn't remember what you just ate.

Both of us checked off *all* the items, so don't worry if you felt that you were beginning to lose your mind. You were simply on automatic, a normal mechanism that allows you to perform unconsciously. The problem is that during these periods you are not mentally engaged in your responses. No new learning occurs. Even with a gun to your head, you cannot recall what you did although you responded appropriately. Active, conscious response during initial learning—overt or covert—is essential for comprehension and recall, but the learner must be completely mentally engaged.

### Feedback

Feedback is one of the most powerful mechanisms for learning.[8] The problem is that a lot of myths are associated with feedback. Feedback is information that learners receive about how on or off target they are (for example, in identifying a component of a system, describing a process, solving a problem, or throwing a curve ball). The learner responds in some way to a critical part of the learning or to all of the learning elements that lead to objective attainment. Feedback comes to the learners from an instructor or from the environment that informs them how on or off target their responses have been. This helps the learners to adjust or continue the responding. From an instructional perspective, feedback should be either corrective (to let the learner alter responses) or confirming (to let the learner know that he or she has attained the partial or complete objective).

Here's what research tells us about feedback:

▶ Feedback that the learner perceives as directed toward the task helps improve performance.

▶ Feedback that the learner perceives as a criticism of himself or herself tends to hinder or reduce performance.

- ▶ Immediate feedback helps improve performance on simple tasks.
- ▶ Delayed feedback seems to be more effective on what learners perceive as complex tasks (feedback given too soon can confuse learners by overloading short-term memory).
- ▶ Frequent and specific feedback helps improve performance. However, if the feedback is too detailed or specific (for example, "In your golf swing, alter the angle of your elbow by 11 degrees, turn your left foot out by four degrees and advance it two inches, adjust the angle of the front surface of your club 2 degrees…"), it confuses the learner and may have an adverse effect on performance.

## Reward

If you put on a new article of clothing and receive compliments about your appearance, what is the likelihood you will wear it again in the future? It's relatively high if you conform to what the research tells us.[9] In learning, if we achieve an objective—master a piece of learning—and are rewarded for our success, the probability of retaining that learning increases. Recognized success encourages most people to learn and retain. When behaviorism was in its heyday, from the mid 1950s to the mid 1970s, the value and impact of reward was almost a sacred law.

Cognitive research tends to temper some of the extreme enthusiasm for the power of reward, but almost all learning researchers still acknowledge the value of re-inforcement. There is a major distinction between intrinsic rewards—those that emerge from the sense of accomplishment when you succeed at learning some-thing—and extrinsic rewards that are associated with something tangible that you are given for learning (for example, a gold star, food, money, or removal of some-thing unpleasant). The more one can include and build in intrinsic rewards, the joy that springs from the learning itself, the better it is for the learner. With certain learners, however, extrinsic rewards in the form of tokens, points, privileges, and removal of unpleasant chores, such as washing dishes, can help associate learning with pleasant experiences.

Taken together, those six universals drawn from research on learning lay the foundation for a powerful instructional model. When supported by what we have learned about how people process information and adult learning principles, we discover the following essential ingredients for creating effective and efficient learning:

- ▶ letting the learners know why the learning is beneficial to them
- ▶ helping the learners clearly understand in a meaningful way what it is they will be learning

- ▶ creating structured activities and information that facilitate acquisition of targeted skills and knowledge
- ▶ building into the learning some opportunities for frequent and meaningful responses
- ▶ providing appropriate, corrective, and confirming feedback with respect to learner responses
- ▶ including appropriate intrinsic and extrinsic rewards, which each learner values, to enhance the pleasure of the learning process and its successful outcomes.

## A Universal Model for Structuring Any Learning Session

Based on the preceding essential ingredients, we now introduce you to a user-friendly, easy-to-apply model for developing any learning session. It allows for all sorts of variations. In this part of the chapter, we present examples of its use with different content, contexts, and target audiences. Applying this model can provide you with an instantly successful learning session. As you become more familiar and comfortable with its use, you can incorporate other elements into it from this volume and from your own experiences and observations. The model has been tested and used in hundreds of organizations with demonstrable success.
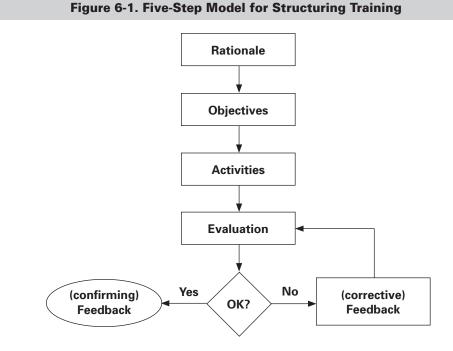
As you will discover, it is easy to use and makes good sense for creating learner-centered, performance-based instruction.

Figure 6-1 presents, in overview, our five-step model for structuring training. Here are some details about the elements of the model.

### Rationale

Provide a rationale. Explain why learners should learn whatever you are presenting to them. Early on in any learning session, the learners require an explanation of why they should attend the session, whether live, e-learning, video-based, or in print. If the learner knows why she or he should learn something and values it, the research suggests that learners have a higher probability of learning it. This is directly tied to the readiness principle—the opening of the mind and spirit—described in chapter 5. In the rationale, the instructor or the instruction informs the learners about what is in it for them and for others (for example, peers, customers, and the company's shareholders). The rationale either can provide an explanation or can lead the learners to discover on their own why they should learn this.

Let's work with an example using somewhat familiar content, performance objectives. Imagine that the audience consists of internal subject matter experts (SMEs)

**Figure 6-1. Five-Step Model for Structuring Training**



who have been tasked with developing and delivering training sessions to customer organizations and third-party vendors who will be selling your products and services. What might we include in a rationale for acquiring skills in developing performance objectives?

**Rationale:**
- As trainers, your success is measured by the success of your learners.
- The more concrete and verifiable what you want your learners to be able to do and say, the more easily you can identify their successes or shortcomings.
- Learning objectives are the targets toward which all of your instruction and all of the learners' learning are aimed. They provide concrete goals for everyone to attain.
- The more easily you can create these objectives, the more readily and smoothly all the other parts of your instruction will fall into place. It will make your lesson planning much easier.
- If your learners know where they are going, the probability that they will get there becomes higher.
- In the rationale, you provide a form of overview of where you are heading in the session. You also build a desire to learn by underscoring how useful, interesting, and exciting this session will be to the learners.

**Performance Objective**

State the performance objective to the learners. Tell them clearly what they will be able to do by the end of the session. If the learners know what they are supposed to learn, research suggests that there's a better chance that they will learn it. The instructor or, if self-paced, the instructional material states the objectives meaningfully in terms of the learner and not in terms of the trainer or training system.

Which of these statements is more appropriate as an objective?

☐ You will be able to convert a service call to a sales call.
☐ I will show you how to convert a service call to a sales call.

The first statement is more appropriate because it is expressed in terms of the learner. The second states what the trainer will do and as such is not a suitable learner-centered, performance-based objective.

The instructor or instructional material also states the objective in concretely verifiable (measurable or observable) terms. Select the item from these two options that you believe is a better performance objective:

☐ You will state the four steps for transforming a service call to a sales call.
☐ You will know the steps for converting a service call to a sales call.

The first objective is better because it uses a more verifiable verb, "state," and names a specific number of steps. The more concretely verifiable the objective is (without it becoming obsessive or trivial), the better the performance objective.

Continuing our example of the content SMEs learning to become trainers, here is how the performance objective might be phrased:

> **Performance objective:** Participants will be able to create for their training sessions performance objectives that are stated in terms of the learner and that contain verifiable verbs and specific performance standards.

**Activities**

Create learning activities that lead to attaining the performance objectives. If learners do things that lead directly to meeting the objectives, there's a better chance that they will attain those objectives. This means that the trainer (or training designer) creates or selects only those activities that lead the learner directly to meeting each objective.

Here is one of the key benefits of this model: It is lean and focused. The rationale provides benefits for the learner. The performance objectives state the contract

between the training and the learners—what they will be able to do and how well. Now, the activities cut out the extraneous and frequently disruptive noise. They focus sharply on objective attainment, nothing more or less. The activities are designed to encourage—even require—learner participation plus more. The activities also should stimulate the learners to contribute their own experiences, imagination, and judgment. After all, these people are adults!

Important to successful learning activities is that they be inherently interesting, even fun. This means that the trainer or training designer should build in elements of challenge, curiosity, and fantasy. For challenge, the activities present difficulties that, with effort, can be overcome to achieve hard-won success. Curiosity means not telling the learners everything at once. The activities have the learners wondering what will happen next. They're curious but not confused.

Finally, fantasy acts like spice. It piques interest and is imaginative. It provokes creative participation. This makes the activities fun and interesting and helps promote a broader type of transfer to the job (encourages visualizing a wider range of application than if all the activities are narrowly focused on the immediate job). Chapter 8 contains 25 examples of interesting learning activities, many of which contain all of these elements.

In our example on performance objectives, possible activities might include these ones:

### Activities:
- For rationale, start with examples of vague statements and clear performance objectives. Have participants select those they prefer and articulate why.
- State benefits of performance objectives for training sessions with job-related examples.
- State the performance objective of this session and analyze and discuss with participants their expectations and the value of this objective.
- Conduct an exercise that has participants identify examples of good performance objectives compared with non-examples, and have them give reasons for their selection. Summarize by highlighting critical characteristics of excellent performance objectives.
- Conduct an exercise in which participants first edit poorly constructed performance objectives, then create objectives from given content, and finally share and correct them in teams. Provide some fantasy content (for example, butter a bagel, pilot a flying saucer). Provide a checklist for verifying objectives.

- Based on their self-selected content, participants generate performance objectives, edit their own, and then edit others' objectives.
- Conclude with a wrap-up discussion on benefits and techniques for generating performance objectives. Participants review all objectives of this session and critique, edit, or approve them.

## Evaluation

Evaluate learner performance. Check to see whether learners have learned. If the learners are assessed on what they are supposed to learn, they have a better chance of learning it. It is important, however, to evaluate in terms of the performance objective and not the person. The trainer or the training system verifies the degree to which each learner has met each objective for the desired level of performance. In self-paced, computerized training, this can be automated and the results recorded for remediation, prescription, or later review. Learning management systems (LMSs) have become very advanced in helping you do all of this.

However, we caution that the results will only be as good as what you programmed the LMS to perform. In live settings, the trainer does what is feasible. This can include asking questions; requesting real or simulated demonstrations; having learners do exercises and then self-evaluate, peer correct, or evaluate in teams; and providing problems and cases and verifying both process and outcome.

The most common tools for checking attainment of performance objectives are performance and written or oral tests, observation checklists, and performance results. (In chapter 9, we go into much more detail on tests and testing.)

Returning to our example, we might handle evaluation in this way:

### Evaluation:
- For the exercise on identifying examples and non-examples of good objectives, use an answer key. Include discussion to justify responses.
- Have participants derive and state critical characteristics of excellent performance objectives.
- Check all edited and generated objectives using the performance objectives checklist.
- Check all participant-generated objectives for their own content using the performance objectives checklist.

## Feedback

Provide feedback in terms of the performance objectives. Let learners know if they've got it right. Correct them when they go astray.

If learners receive information on how well they are learning, they tend to learn better. For this reason, learners must receive feedback throughout the training session. As mentioned earlier with respect to research on feedback, always give feedback in terms of the performance objective and not the person. Generally, the best time to provide feedback is directly after the evaluation. For difficult or complex tasks, however, feedback can be effective if it comes just prior to the next attempt or practice. This acts as a refresher in terms of learning and a just-in-time prompt. If evaluation causes anxiety, which is frequently the case with adult learners, don't keep them guessing. Provide sufficient, immediate feedback to reduce stress and encourage learning.[10]

Most important, feedback comes in two forms: corrective, which explains to the learners how they can attain the objective, and confirming, which informs the learners that they have attained the objective. Corrective feedback always must be stated positively and encouragingly.

Feedback is not always something one can specifically plan for. Nevertheless, the feedback component is essential and omnipresent in training. In our example, we might offer this feedback
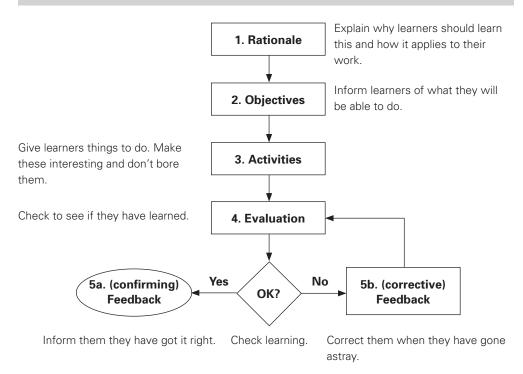
**Feedback:**
- As learners acquire skills and knowledge about performance objectives, provide corrective and confirming feedback on a continual basis.
- Following each exercise, provide specific information on how to improve performance or confirm the correctness of the response in relation to the performance objective.

Figure 6-2 presents the five-step model for structuring training annotated with a summary of the main points made in this section of the text. This model, as simple as it appears, incorporates significant findings from research on learning that help learners acquire new learning efficiently and effectively.[11] In the next section, we transform the model into operational worksheets and try them out with content.

## The Training Session Planning Session

Examine figure 6-3 and note how we have transformed the five-step model into a planning sheet. The planning sheet enables you to take a first cut at creating your training session. Also note two of its key characteristics. First, it is not content centered. Rather, it forces you to think about the learners. It begins with the requirement for a rationale that provides meaningful benefits to the learners. It also requires learner-centered, performance-based objectives that are meaningful to and valued by the learner. It specifies the activities that will lead the learners to objective attainment.

**Figure 6-2. Annotated Five-Step Model for Structuring Training**

| | |
|---|---|
| **1. Rationale** | Explain why learners should learn this and how it applies to their work. |
| **2. Objectives** | Inform learners of what they will be able to do. |

Give learners things to do. Make these interesting and don't bore them. → **3. Activities**

Check to see if they have learned. → **4. Evaluation**

**5a. (confirming) Feedback** ← Yes — **OK?** — No → **5b. (corrective) Feedback**

Inform them they have got it right.    Check learning.    Correct them when they have gone astray.

Activities must maintain at least a 50-50 balance between learner and instructor or instructional content in self-paced mode. It then asks how learner attainment of the objectives will be evaluated. (In chapter 9, we'll spend a considerable amount of time on appropriate evaluation methods and tools.) The final step, corrective and confirming feedback, should be a natural outgrowth of the evaluation and spontaneously adapted to how each learner performs. It may be useful, however, to anticipate where difficulties will occur and how these can best be addressed if the learner needs to be brought back on track.

Second, note the brevity and simplicity of the planning sheet. You are asked to think about each session and then write your plan in bulleted format. Remember, as we discussed in chapter 2, our natural tendency as content specialists or SMEs is to fill up a training session plan with content. Here, instead, we are asking you to focus first on the customer. When you have planned your training-learning strategy, you can go for the necessary, relevant content that the learners can absorb and retain.

Now let's proceed to an example that enables us to try out this training session plan. Ready for your first test flight? We'll start with a fantasy setting to keep things simple.

**Figure 6-3. Training Session Planning Sheet**

Session title: _____
Target audience: _____
Time allotted: _____

Rationale:

Objectives:

Activities:

Evaluation:

Feedback:

Rationale → Objectives → Activities → Evaluation → OK?

OK? — Yes → (confirming) Feedback

OK? — No → (corrective) Feedback

### Sample Planning Scenario: A Ticket to the Fair

**Background:** Once a year, the state holds a large-scale fair. For one week, hundreds of thousands of paying visitors flock to it. Each year, the State Fair Commission hires temporary workers for various jobs. You are responsible for training 45 ticket sellers. They have to be accurate and fast because lines can get long and paying visitors impatient. Accuracy and speed are the two key success criteria. The system is totally manual. All of the potential ticket sellers are novices, have gone through background checks, and are bonded.

**Target audience:** Part-time ticket sellers with education levels ranging from grade 10 to some college. All are over 18; some are as old as 70. About two-thirds are women. None have dexterity problems or significant hearing or vision impairments.

**Session subject:** Calculating admission costs, taking money, issuing tickets, and giving change.

**Time allotment:** Two hours, 30 minutes.

**Training context:** Classroom and crudely simulated ticket booths.

Given the details of the scenario, we developed the training session plan depicted in figure 6-4. We detailed this training session plan a little more fully than we might normally. As a first example, however, we felt that a little extra information would help you visualize the training session more clearly. Once you have read it, assess the plan using checklist 6-1.

You may have had to do some guessing to complete checklist 6-1, but overall a "yes" should be checked off for each item. If not, determine what we could have done to obtain checkmarks in all of the "yes" boxes. Improve our session, please.

## The Training Session Scripting Sheet

The training session planning sheet simply was a first attempt at organizing a learner-centered, performance-based learning experience. In many instances, that may be sufficient. All you would have to do is add the timing, plan your resources, and then collect and prepare your materials for tryout. Here is a simple rule of thumb for planning learner-centered, performance-based training sessions:

*The more content expertise the trainer possesses, the less content information you require in your plan. The more training capability and experience the trainer possesses, the less instructional detail you require in your plan.* This is mainly true for live, synchronous training. For self-paced learning of any nature, the final plan must contain more details for both content and instructional methods.

## Figure 6-4. Sample Planning Sheet

### Training Session Planning Sheet

**Session title:** Selling tickets, collecting money, and giving change

**Target audience:** State fair ticket sellers (15 participants per session)

**Allotted time:** Two hours, 30 minutes

**Rationale:**
- The most important and trickiest part of the job is selling tickets and making correct change.
- Despite background noise, if you've got the knack, you won't have problems.
- You are responsible for your errors up to $100. Learn the job right, and you will be error free.
- Every day we have a bonus for the quickest and most accurate ticket seller.
- Some people get hostile when you are slow or make errors. This session will help you avoid the pain.

**Objectives:**

*Overall objective:*
Participants will be able to sell the exact number and type of tickets, collect the exact amount of money, and give the correct change for any customer without error and at an average time of 20 seconds per transaction (maximum group of eight people per transaction).

*Specific objectives:*
- Identify the exact numbers and types of admission tickets the customer requests.
- Calculate the exact total cost in 10 seconds with no errors.
- Collect the correct total amount with no errors.
- Give the customer the exact change with no errors.

**Activities:**
- Draw from participants what concerns them most about their new job.
- Show how this session helps decrease or eliminate those concerns.
- Present key points of rationale and discuss each one.
- Show ticket price / customer job aids and demonstrate use.
- Using different voices and admission requests, have participants determine exact request and cost.
- After several examples, time the exercise.
- Using play money and coins, have participants practice collecting money, issuing tickets, and giving change. This is a peer-pair activity.
- In simulated ticket booths, create a practice session putting all parts together. Loudly play audiotape of background noise.

**Evaluation:**
- Practice exercises with timing toward the end for each activity.
- Final evaluation: In the simulated ticket booths, each learner services 10 peer customers, each with different characteristics and requirements. An audiotape plays loud background noise. Peers talk.

**Feedback:**
- Provide participants with feedback on how they are doing and how they can improve through self-assessment, peer assessment, and trainer verification.
- Provide timing and accuracy information following final evaluations. Suggest ways to improve, as necessary.

**Checklist 6-1. Training Session Planning Sheet Assessment**

| Criterion | Yes | No |
|---|---|---|
| The rationale is presented in terms of the learners. | ☐ | ☐ |
| The learners participate and contribute in building the rationale. | ☐ | ☐ |
| The performance objectives are stated in terms of the learners. | ☐ | ☐ |
| The performance objectives are verifiable. | ☐ | ☐ |
| The performance objectives are appropriate to the learners and the content. | ☐ | ☐ |
| The activities are appropriate to the performance objectives (they lead the learners to attain the objectives). | ☐ | ☐ |
| The activities require learner participation at least 50 percent of the time. | ☐ | ☐ |
| Learners can participate and contribute during the activities. | ☐ | ☐ |
| Evaluation is appropriate to the performance objectives. | ☐ | ☐ |
| Feedback is appropriate. | ☐ | ☐ |
| The session can be conducted within the allotted time. | ☐ | ☐ |

When greater elaboration of the training plan is called for, the five-step model can be expanded to accommodate more scripting. In this book we provide a set of training session scripting sheets only for live, instructor-led training because every other type of delivery method has its own unique set of detailed requirements. Linear video scripting differs from random-access, learner-controlled video scripting, and both are dissimilar to all of the endless varieties of e-learning formats.

We have found the training session scripting sheets depicted in worksheet 6-1 and figures 6-5 and 6-6 to be helpful when circumstances warrant their use. These are a few of such circumstances:

▶ When you have relatively inexperienced trainers: It gives them a script to follow and increases their probability of success.

▶ When your trainers are insecure about the session: The scripting sheet becomes a "security blanket" for them.

▶ If you have several trainers running the same session (some of whom like to do their own thing): It provides uniformity of approach.

▶ In situations with a high requirement for consistency across trainers and locations: Scripting sheets lay out a common approach that facilitates monitoring of consistency.

▶ Where there is frequent turnover of trainers: New trainers have a ready-to-run session already prepared for them.

**Worksheet 6-1. Training Session Scripting Sheet**

**Session Title:** _____

**Target audience:** _____

**Time allotted:** _____

**Objectives:**

| Do | Say | Resources | Time |
|---|---|---|---|
| | | | |

**Figure 6-5. Contents of the Training Session Scripting Sheet**

**Session Title:**    Taken from the session planning sheet

**Target audience:**    Taken from the session planning sheet

**Time allotted:**    Taken from the session planning sheet

**Objectives:**  Taken from the session planning sheet. If there is an overall objective, state it first. Then include the specific objectives.

| Do | Say | Resources | Time |
|---|---|---|---|
| This resembles stage directions in a play. List in order what both trainer and learners actually do—what can be observed. | This is like the script of a play. You provide the trainer with actual words or speaking suggestions. If the trainer requires content help, detail content points. If the trainer requires instructional methods guidance, detail instructional messages he or she is to state. | This is like the prop specifications for a play. For each instructional activity or event, list the media or resource requirements. | For each instructional activity or event, list the exact time allotment. |

## Figure 6-6. Sample Training Session Scripting Sheet

**Session Title:**  Selling tickets, collecting money, and giving change

**Target audience:**  *State fair ticket sellers (15 participants per session)*

**Time allotted:**  *Two hours, 30 minutes*

**Objectives:**  *Overall objective:*
Participants will be able to sell the exact number and type of tickets, collect the exact amount of money, and give the correct change for any customer without error and at an average time of 20 seconds per transaction (maximum eight people per transaction).

*Specific objectives:*
- Identify the exact numbers and types of admission tickets the customer requests.
- Calculate the exact total cost in 10 seconds with no errors.
- Collect the correct total amount with no errors.
- Give the customer the exact change with no errors.

| Do | Say | Resources | Time |
|---|---|---|---|
| • Smile warmly. Pose questions to group. | • Ask: "As you face this new job as ticket sellers, what concerns, even fears, do you have right now?" | | • Eight minutes |
| • Write responses on flipchart (F/C). | • Ask: "As I point to each item you have given me, raise your hand if you feel this. I'll write down the numbers." | • F/C and felt-tip markers. | |
| • Point to each item on the F/C, count raised hands, and jot down number. | | • F/C and felt-tip markers. | |

| | | |
|---|---|---|
| • Show key points from rationale. | • State: "As you can see, quite a few of you share the same fears and concerns. Let me assure you that this is normal. Everyone is a bit scared of the unknown. What is great for you is that this session will lay a lot of those concerns and fears to rest. Let's see why." <br> • Explain how this session prepares the learners to serve the customers, despite all the noise and pressures. <br> • Stress the benefits and fun the learners will derive from the practice exercises in this session and note that they may win prizes. | • Prepared F/C sheet with session benefits for learners. | |
| • Show prepared F/C with objectives. <br> • Read, explain, and discuss overall specific objectives. Move briskly. If there are concerns, put those on a separate sheet for handling later. | • State: "Here are the objectives for this session. Let's read the overall one first and discuss it. Then I'll briefly explain each of the specific objectives you will achieve by the end of this session." | • Prepared F/C sheet with objectives. | • Three minutes |

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### Using the Five-Step Model to Retrofit Existing Training Sessions

Suppose you have inherited someone else's existing course materials and plans. You examine them and discover that they are not much more than large data dumps. They are rich in content but essentially involve telling/one-way transmission. They may even include a vast number of slides with scripted text. What can you do to increase their effectiveness without starting from scratch? (This equally applies to a great deal of print and computer-based courses.)

Here is our suggestion for retrofitting existing training to the five-step model: Take one existing, content-heavy course. Examine it to determine its overall reason for existence. Derive from all of this material what people exposed to it are supposed to be able to do with the content. For example, suppose the course is about a new line of products, and it is aimed at the sales force. By reviewing all the course materials, you derive the following rationale and objectives:

*Rationale:* The market has been crying out for a new line of sewing needles. With the population aging and sight declining, people are finding it harder to thread needles. They also are looking for needles that are better and more versatile. Coinciding with this is an upsurge in sewing hobbyists as people retire and have more leisure time. Interest in needlepoint, fashion design, dressmaking, quiltmaking, and even sailmaking has grown. Our new needles have attractive features and benefits for wholesalers, retailers, hobby clubs, and end users that knock the socks off the competition. They offer you incredible opportunities to corner the market, increase sales, and significantly improve your earnings. Not only that, they are entirely innovative products…. (We think you get the idea.)

*Overall objectives:* By the end of this session, you will be able to identify innovative sales opportunities for the new product line, favorably position it against all of your competitors, and present the novel products in a way that increases customer profit margins by 20 percent to 30 percent and your commissions and volume by at least 20 percent to 40 percent.

*Specific objectives:*

▶ Name and describe the unique features and benefits of the new needle product line and each of the products.
▶ Precision target wholesale, retail, and hobby club customers for the product line and/or specific products.

Notice how you are taking an existing, content-based course and transforming it into a more learner-centered program?

Break the existing course into its individual components. Reorganize it, if necessary, to create a logical learning sequence, one based on the logic of learning, not the logic of the content. Eliminate unnecessary components or place them in a reference manual if management won't let go of them.

▶ For each retained component, create a rationale and objective.
▶ For each component, create interactive, participative activities that involve the learners.

In our example, have the learners play games to match features and benefits to products. Instead of telling them about the appropriate products for specific customer groups, provide customer cases and, in teams, have the learners examine the product documentation and recommend suitable matches. Build a full menu of engaging, learner-centered, performance-based simulations and exercises.

To evaluate, create challenging quizzes; tests; competitions (after all, these are sales representatives); and especially cases for individuals, peer pairs, and teams to solve. Provide tools and checklists for peer and self-evaluations. Develop an evaluation activity for each performance objective.

Make sure that throughout the revamped session there is room for a lot of dialogue and feedback that confirm and correct as appropriate.

Voila! The five-step model can become a retrofit recipe for converting dull, telling sessions into highly motivating and effective learning events.
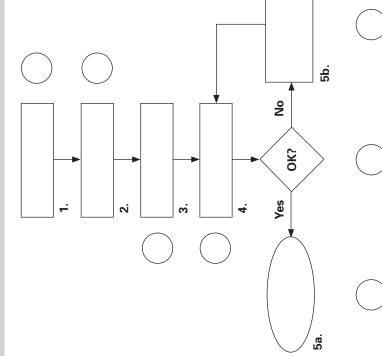
## Final Review of the Five-Step Model

This has been your longest chapter so far. It requires pulling together some key content. Figure 6-7 is a blank chart for the five-step model coupled with some key points about each part of it. To help you retain the model, fill in the blanks beside each number. Then, in the circles place the letter of the correct key point that relates to each element. To check your responses, turn back to figure 6-2.

### Remember This

Once again, we have a quick, closing quiz. Just cross out the incorrect option in parentheses to make each sentence come out right. Then we'll give you our take on how we would answer.

1. We are all (*alike / very different*) when it comes to how we perceive, process, store, and retrieve information for learning.
2. Expectancy value helps learners determine the (*why/structure*) of a learning session.

**Figure 6-7. Five-Step Model for Structuring Training**



a. Inform them what they will be able to do.

b. Inform them they have got it right.

c. Check to see if they have learned.

d. Correct them when they have gone astray.

e. Give them things to do. Make these interesting and don't bore them.

f. Explain why they should learn this and how it applies to their work.

g. Check learning.

3. If you don't know where you're going in a learning session, you'll probably (*soon figure it out / end up someplace else*).
4. Humans seek order and structure in instruction. If there is none, (*they will create it artificially / accept this state and be with it*).
5. Meaningful covert and overt responding (*slow down a learning session / increase the probability of learning*).
6. Essential for initial learning is (*active, conscious engagement / an automatic, unconscious mental state*).
7. Feedback should be (*positive or negative / corrective or confirming*) following evaluation of learning.
8. A feeling of accomplishment based on something you value is an (*intrinsic/extrinsic*) reward.
9. In the five-step model, "rationale" is related to the adult learning principle of (*autonomy/readiness*).
10. Sophisticated LMSs provide (*meaningful, usable diagnostic, instructional and learner data automatically / learner data that is only as good as what you program it for*).

Here is our feedback:

1. We are all alike when it comes to how we perceive, process, store, and retrieve information for learning. Unless there is some physiological or pathological issue, humans treat information using the same biological mechanisms. As a species, most of how we deal with new learning is generalized across all of us.
2. Expectancy value helps learners determine the why of a learning session. Expectancy value can be colloquially stated as WIIFM—What's in it for me?
3. If you don't know where you're going in a learning session, you'll probably end up someplace else. An old, but all-too-true saying. Without a clear sense of where the instruction is headed, learners become easily lost and soon flounder or make incorrect assumptions about the learning message. Training must provide learners with clear objectives that are meaningful to them.
4. Humans seek order and structure in instruction. If none exists, they will create it artificially. We seek to make order out of chaos. New skills and knowledge are more easily stored in long-term memory if they are logical and organized for connection to prior knowledge. Then, through practice, the learning becomes progressively easier to retrieve.
5. Meaningful covert and overt responding increase the probability of learning. There is no research evidence to suggest that active learner responding affects the length of a learning session. However, there is massive evidence that such response engagement produces more effective learning and retention.

6. Essential for initial learning is active, conscious engagement. An unconscious state of mind does not allow us to register what is being taught. When we "zone out," we are no longer aware of what is happening. Learning goes practically nowhere. Active mental engagement, however, increases the probability of learning, especially during initial stages when we are still seeking to make sense of new material.

7. Feedback should be corrective or confirming following evaluation of learning. Positive and negative feedback have connotations that are incompatible with supporting learning. Feedback should be focused on task, not person, and either provide the right dose of information to place the learner back on track—corrective—or let the learner know that she or he has met the desired goal—confirming.

8. A feeling of accomplishment based on something you value is an intrinsic reward. Intrinsic rewards are internally generated based on personally meaningful success. Extrinsic rewards originate outside of the learner. These are valued more than accomplishment of the learning task itself and compensate for the lack of internal interest in goal accomplishment.

9. In the five-step model, "rationale" is related to the adult learning principle of readiness. The rationale gives the learner a valued reason for learning. It helps open the mind to the learning session and is therefore most related to the readiness principle.

10. Sophisticated LMSs provide learner data that is only as good as what you program it for. While LMSs can do wonderful things, particularly those that have been around for a while and have versatile capabilities, what you ask it to do gets you what it gives back to you. You must configure your LMS to produce the right types of data in the most usable, comprehensible formats. How you program it determines what you will obtain from it.

To close out on this central chapter, bear in mind that although we are attracted to the notion of how unique each of us is, when it comes to learning we are far more similar than we are different.

If adult learners know why they should learn, what they will be able to do as a result of learning, see how all the learning pieces fit together, practice, get feedback, and are rewarded for their learning … they learn.

By applying the five-step model—rationale, objectives, activities, evaluation, and corrective and confirming feedback—you increase the probability of learning.

Now we can turn to how we can help make learning stick, the subject of the next chapter.