Training 101
An Introduction to Planning and Executing Training Projects.

For Learning and Development Team Inductees
Version 1.0

By Daniel Aharon
About The Author

Daniel Aharon, CPLP® has been a learning and development professional for over a decade and has held full time positions as a coach, facilitator, training lead and manager with the learning and development divisions of various target oriented corporate setups in India.

He has also held conferences to lead and support training and change management initiatives aimed at business development at client locations in the US, UK and Canada.

Daniel believes in supporting, and inventively extending, the leadership’s vision of a results-based approach to training. He is committed to preventing knowledge loss, reducing knowledge float, and adding to the credibility and competence of the learning and development function with his unique set of skills, qualifications and experience.

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A walkthrough of steps executed generally towards the successful analysis, design, development, implementation and evaluation of an organization’s learning and development effort with the objective of making the effort, rational, relevant and reproducible over time.
Objectives

- The Five Stages
  - Analysis
  - Design
  - Development
  - Implementation
  - Evaluation
- Tying it Together
- The Five Disciplines
- Questions

What we hope ever to do with ease, let us learn first to do with diligence.

~ Samuel Johnson
The Five Stages

The five stages all well planned training projects go through.

• Analysis
• Design
• Development
• Implementation
• Evaluation

In project management terms, you can think of these as qualitative equivalents to the Initiating, Planning, Executing and Closing phases.

We will next go over these one-by one.
Analysis

Analysis begins with the training demand being received.

All effective training campaigns have their roots in sufficient analysis more than anything else and there are many angles to the analyses that may be required to be carried out to understand the need to design and run a particular training campaign; these could be:

- Requirement Analysis
- Business Analysis
- Gap Analysis
- Root Cause Analysis
- Participant Analysis

What gaps in performance have been identified? What knowledge or skill deficiency exists? What is the root cause of the deficiency? Is this something that individuals can be trained on? Have learning outcomes been validated? Is leadership convinced of its need or necessity? Is the capability or resource available in-house? How do our contemporaries bridge this gap? Are the right resources hired/identified? What is the cost/estimation for this initiative?

Alert! Training is NOT the solution to all problems. Good analysis will tell you that before you’re invested.
Design

The final forms of the key components of training are decided.

Components of training include type of content, duration, environment, resources, delivery and evaluation methods.

E.g., Communication skills training ought to include much longer coaching and post training supplemental feedback than new software product training and the evaluation methodology may also vary quite a lot.
Development

Training components are created, or sourced and assessed.

This is the phase at which training content is created afresh or, sourced from external agencies or repurposed from previously existing content. Quality assurance and evaluation tools too are developed at this stage.

E.g., Communication skills training may require you to create content and evaluation tools that are principally different than the content and tools you would need to conduct SAS training.

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<th>SCENARIO 2</th>
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<td>• Attendance, Feedback and Observation Sheets</td>
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Implementation

Training is delivered.

This is the stage that most people refer to as “training” because this is where the background work that you’ve done manifests into activities that create an opportunity for actual learning transfer. Implementation is where the rubber meets the road, i.e., participants come in contact with the training campaign. Even the smallest of things if not taken care of, can dent the overall effectiveness.

Some of the things you may be doing at this stage are in the two clouds below:

Activity:
Can you spot some similarities and differences and guess which one of the clouds bears in-house implementation?

Welcome participants, discuss HLOs, present topics, identify learning goals, ice-breakers, concept downloads, demos, role-plays, group activities with lead-ins and debriefs, play videos with debriefs, discuss scenarios, practice responses, mock ups, simulations, inversion, assessment, feedback and OJT follow ups.

Welcome participants, discuss HLOs, handover to consulting facilitator, conduct early dipsticks, and classroom observations, document end-of-session debrief from facilitator, maintain attendance and parked questions tracker. Later, track OJT follow-ups.
Evaluation

Quality of delivery and overall effectiveness – 4 level.

End-of-training feedback sheets are often called Happy Sheets. They are called that not just because of the smileys on them but also because end-of-training euphoria and the overall happiness of the learning participants play a significant role in landing those high scores that are often misconstrued as training effectiveness evaluation. In reality, it takes a four level evaluation – called the Kirkpatrick Levels – to determine the benefits of any training program for the organization that paid for it.

R eaction

How did the participants feel?

R esponse

What did the participants learn?

R esult

What could the participants apply to their jobs?

R eturns

What was the organization’s return on investment?

Quick Question: At what stage should the instructional designer start preparing for Evaluation?

Note: Response and Result are also called Learning and Behavior.
Tying It Together…

...with Task Breakdown Analysis

If you are not planning to succeed, then you are planning to fail, they say.

The best way to plan and track the stages is to break them down into bite sized tasks and put the tasks on a project template with ownership, start and end dates and individual statuses.
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<td>Identify and prioritize goals.</td>
<td>Determine the initial project scope and milestones.</td>
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<td>Define project boundaries and constraints.</td>
<td>Set project parameters and resources.</td>
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<td>Conduct feasibility studies.</td>
<td>Evaluate potential solutions and alternatives.</td>
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<tr>
<td>Develop and refine project plans.</td>
<td>Create detailed timelines and action plans.</td>
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<tr>
<td>Establish project governance structures.</td>
<td>Define decision-making processes and authorities.</td>
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<tr>
<td>Communicate project objectives and roles to stakeholders.</td>
<td>Inform all stakeholders of their responsibilities.</td>
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<tr>
<td>Identify and mitigate project risks.</td>
<td>Assess potential risks and develop contingency plans.</td>
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<td>Monitor project progress and adjust plans as necessary.</td>
<td>Track progress against milestones and adjust priorities.</td>
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<tr>
<td>Close the project and transition to operational use.</td>
<td>Finalize project documentation and handover to stakeholders.</td>
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**Tying It Together…**

- **Task Breakdowns**
  - 1. **Identify and prioritize goals.**
  - 2. **Define project boundaries and constraints.**
  - 3. **Conduct feasibility studies.**
  - 4. **Develop and refine project plans.**
  - 5. **Establish project governance structures.**
  - 6. **Communicate project objectives and roles to stakeholders.**
  - 7. **Identify and mitigate project risks.**
  - 8. **Monitor project progress and adjust plans as necessary.**
  - 9. **Close the project and transition to operational use.**

**Operational Task Initiation**

- 10. **Ensure project goals are aligned with business objectives.**
- 11. **Develop project scope and milestones.**
- 12. **Create project timelines and action plans.**
- 13. **Define decision-making processes and authorities.**
- 14. **Inform stakeholders of their responsibilities.**
- 15. **Assess potential risks and develop contingency plans.**
- 16. **Track progress against milestones and adjust priorities.**
- 17. **Finalize project documentation and handover to stakeholders.**
Learning/Change Management Schema...

...based on Peter Senge’s five disciplines for learning organizations
Questions to ask before starting off on an L&D initiative.
CM Schema - Shared Vision

Has the vision been shared?
Have objectives been discussed?
Have learning outcomes been validated?
How well will it work with existing systems? 
Is it going to make meeting existing targets easier? 
Do our present/future clients value it?
How well does the organization identify with it?
Is this a cultural positive in the organization?
Do our leaders believe in this learning’s utility?
What support do individuals receive towards mastery? Are they given time out for the training? Are they going to have OJT-coaching follow ups?
CM Schema – Team Learning

Do teams get rebuilt-replenished with the exercise? Is this an opportunity to create new teams? Is this an opportunity to move into new teams?
Thank you!

Disclaimer: The information presented herein does not constitute technical or other professional advice and is general in nature. It does not take into account your specific circumstances and should not be acted on without full understanding of your current situation and future goals and objectives by a fully qualified organization development or corporate performance consultant. In doing so you risk making commitment to a technique and/or strategy that may not be suitable to your needs.

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