



ASTD's Ultimate Train-the-Trainer: A Complete Guide to Training Success

ASTD Ultimate Series



ELAINE BIECH



Alexandria, Virginia

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Development/Production Editor: Robin C. Bonner

Copyeditor: Ellen N. Feinstein

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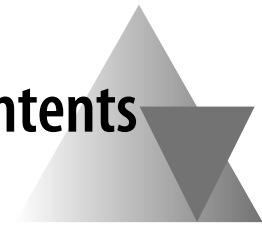
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The Ultimate Kids**

The ASTD Ultimate Series



ASTD Press's *Ultimate* series is a natural follow-on to the popular *Trainer's WorkShop* series. Like the *Trainer's WorkShop* series, the *Ultimate* series is designed to be a one-stop, practical, hands-on road map that helps you quickly develop training programs. Each book in the *Ultimate* series offers a full range of practical tools you can apply or adapt to a variety of training scenarios. As in the *Trainer's WorkShop* series, you will find exercises, handouts, assessments, structured experiences, and ready-to-use presentations, along with detailed facilitation instructions. So what's the difference? The *Ultimate* series aims to present the full scope of various topics, offering today's overcommitted training professionals even MORE practical and scalable help: More practical exercises, handouts, assessments, and other ready-to-deploy training solutions. More detailed instructions. Broader topic coverage. More downloadable material. In short, more value for your training budget dollars.

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Elaine Biech
ebb associates inc
Norfolk, VA



Preface

Introduction to ASTD's Ultimate Train-the-Trainer

Training is the ultimate profession. Training touches everyone at every age, in every occupation, in all walks of life, throughout the world. Training opens doors to additional opportunities, opens eyes to innovative ideas, and opens minds to fresh concepts.

Training can resolve problems, prepare the unqualified, guide those who need direction, and give hope to those who are desperate. Training encourages, excites, enables, enriches, enlightens, and empowers. Being a trainer is the ultimate job if you want to make a difference in the world.

Preparing others for this profession by conducting a train-the-trainer is the ultimate assignment. Conducting a train-the-trainer session is an honor. It signifies that you have reached a certain level of expertise: You have the skills and knowledge and you have enough experience under your belt to be recognized as the ultimate trainer—someone who assists others in learning the craft.

So what advice do you give a competent individual, like yourself, who is in the ultimate profession with the ultimate assignment? Two things:

- Maintain your spark.
- Light fires.

Maintain Your Spark

To stay effective as a trainer, you must maintain the spark of excitement that demonstrates that you love what you do. If you are conducting train-the-trainer sessions, you are most likely one of those trainers who does not get up to “go to work” in the morning but instead gets up to “go play.” Even so, maintaining your excitement may be difficult at times if you are repeatedly conducting the same learning experience. Perhaps these suggestions will help you.

Become a life-long learner. The life-long learner concept is not new, but finding new ways to learn is. Attending a virtual learning event, taking a class at your local college, attending the ASTD International Conference & Exposition, learning a new computer program, or reading the latest business books are all good suggestions. But have you thought of leisure outings as learning experiences? Go fishing with your significant other. Visit a museum with your children, grandchildren, or the kid next door. Take lessons in a new sport. Purchase and read a magazine you’ve *never* read before. Peruse a

different book section at your bookstore. Visit a toy store and play as if you were seven years old. At work, you can get yourself a mentor. Or, learn more about your organization by shadowing a manager who works in a department about which you know little. All of these experiences will add breadth to your knowledge base and excitement to your discussions. And think of the stories they will spawn when you are conducting training!

Expand your network. Networking is one of the best ways to maintain your spark. Meeting others and getting their perspectives produces new ways for you to approach life. Professional organizations can provide a networking list of people you can contact. The next time you attend a local ASTD chapter meeting, schedule lunch with another attendee. Every person you meet ignites new ideas for how you approach life and your work as a trainer.

Become the best. Your participants expect you to be on the leading edge of advances in the field. Establish standards for yourself that will keep you on your training toes, reaching ever higher for the bar of excellence. List your training values and what you believe in as a trainer. Obtain certification or accreditation in your chosen field: a Certified Professional in Learning and Performance (CPLP) as a trainer, a Certified Speaking Professional (CSP) as a speaker, a Certified Professional Facilitator (CPF) as a facilitator, or whatever is most relevant. What you learn becomes the kindling to feed the flames of excitement as you deliver your next training session.

Try something new. Find ways to make every training session as exciting as your first, by incorporating new activities, doing something different (like serving popcorn with a movie), inviting guest speakers, or co-facilitating with a colleague. Trying something new in a training session keeps the training fresh for both you and your participants. Make it a dynamite training session!

Light Fires

The most rewarding aspect of my career occurs when former participants tell me that something I said in a session inspired them to make a significant change in their lives. As a trainer, you inspire others to use their talents and expand their horizons. You encourage them to try something new. You excite them with possibilities. You energize them about their work. And you renew their confidence in themselves and their value to their employer.

Model excellence. To inspire, encourage, excite, energize, and renew, you need to model what you expect your participants to do. When you conduct a train-the-trainer session, your participants will look at your presentation as the “correct way” to conduct training. Of course you will not do everything perfectly. When you do err, though, use it as a learning moment. Be honest about what happened and open the incident up to discussion. You will be respected even more for being honest and candid.

Stay ahead of trends. Everybody’s talking about them. Whether it’s a discussion about how the Obama campaign was run or a dialogue on how the building industry can become “green,” trends are the focal point of many conversations. A few of the trends that have an effect on the training profession include

social networking, multi-tasking and partial attention, accessibility, high levels of stress, super-sizing and fast pacing, and customizing for globalization. Demonstrating new concepts as a trainer requires you to stay ahead of the trends.

Make yourself available. Your participants will look to you as the “go to” person for almost anything: book referrals, help in finding resources, introductions, or just a willing ear. Whatever the reason, make time and make space in your busy life to assist in whatever way you can. Addressing participants’ requests may not be in your job description, but this task is critical to being a professional who makes a difference in the world.

Be prepared to coach. This is related to making yourself available. Participants will come to you asking for advice. Sometimes you will have some ideas, and other times you may not. Usually, they will have the answers inside them and you will just need to guide them through a series of questions to help them discover those answers. Learn a few coaching skills to keep the fires of knowledge burning that you lit while your participants were in your training session.

Be the Best of the Best

The book you hold in your hands provides you with the basics for providing the “ultimate” experience for your participants. To be the best of the best, however, requires investment on your part—an investment in *you*. What better place to invest?

Find ways to maintain your spark: Become a life-long learner, expand your network, become the best, and try something new.

Gear up to light fires: Model excellence, stay ahead of trends, make yourself available, and be prepared to coach.

As the ultimate trainer in the ultimate profession delivering the ultimate assignment you have the capacity to create spontaneous combustion. Maintain your spark as a trainer. Light a fire of desire in each of your participants.

Elaine Biech
Norfolk, VA
July 2009

Finding Your Way Around: How to Use This Book Effectively

1

What's in This Chapter?

- An overview of the entire book
- Ways in which this book will support you in conducting a train-the-trainer workshop
- Descriptions of what the icons represent
- Descriptions of the contents of the CD
- Introduction to the jargon used throughout the book



Train-the-Trainer: A Blessing or a Curse?

A train-the-trainer workshop is the most unique training you can deliver. It is a metatraining, that is, you are actively modeling exactly the same thing that you are training your participants to do (*meta* being a prefix meaning “within” or “among”)! This can be either a blessing or a curse.

A train-the-trainer session is a blessing because you can easily take advantage of the setting. You don't have to make up case studies—the session *is* a case study. You don't have to create role plays—you are playing the role right in front of your participants' eyes. You don't have to go on a field trip—you are in the middle of the action. However...

A train-the-trainer session is a curse because you are modeling the very skills you are explaining. You are “on” 100 percent of the time. You can bet participants are watching what you are doing. They're wondering if you do what you tell them to do. To quote a tired old phrase, “Do you walk the talk?” So, what happens when you are not the perfect model? Take advantage of imperfection by turning it into a lesson. When things go wrong, turn it into an opportunity for participants to problem solve what they will do when the same thing happens to them.

Sometimes modeling can backfire. Once, the fire alarm rang as I was speaking at a conference. I was presenting “creativity,” and the participants refused to leave the room because they thought that I had planted the alarm as part of my “creative” demonstration!

Although you have to be better prepared for conducting a train-the-trainer workshop than almost any other training you will ever conduct, it is an honor to have a chance to share your knowledge and expertise with your colleagues.

Train-the-Trainer Content

The content of this book aligns with the ADDIE model. ADDIE is the commonly accepted instructional systems design (ISD) training cycle used by most people in the workplace learning and performance (WLP) profession; it represents the process used to create and deliver training. The acronym stands for *analysis, design, development, implementation, and evaluation*. The three-day train-the-trainer session, which covers all the train-the-trainer content in this book, is divided into five modules:

1. **Module 1—Introduction:** the welcome, objectives, and introduction to the content.
2. **Module 2—Assess and Analyze:** the importance of assessing learners’ needs and ways to gather data.
3. **Module 3—Design and Develop:** how a training designer, using the data gathered in the needs assessment, creates learning objectives. These objectives provide the foundation for creating a training program to help adult learners gain the required skills and knowledge.
4. **Module 4—Implement and Facilitate:** how to facilitate the training session confidently and competently, while keeping the focus on the learner.
5. **Module 5—Evaluate and Enhance:** the importance of evaluation, Kirkpatrick’s four levels of evaluation, and the need to use what you learn from evaluation to make improvements.

To make it easy for you, the same numbers are used to identify the teaching materials and the modules in the Trainer’s Guide (chapters 5 through 9). Each of the participant handouts has a number and a title at the top of the first page. (Most handouts are only one page in length, but a few are longer.) The number refers to the module, as well as the number of the handout within the module. For example, **handout 3-13**, Know Your Training Style, is the 13th handout in module 3, Design and Develop. It’s referenced in chapter 7, “Trainer’s Guide: Module 3—Design and Develop.”

Training Basics: Adults and Learning

The title of this book is *ASTD's Ultimate Train-the-Trainer: A Complete Guide to Training Success*. I chose the subtitle with great care. Although *A Complete Guide to Training Success* refers to your success in conducting the session, focusing on the success of your participants is even more important. As a competent and credible trainer, you are responsible for making sure that your focal point is to address your participants’ needs. As Stolovitch and Keeps say in *Telling Ain't Training*, “Start with the learner and never lose focus” (Stolovitch and Keeps, 2002).

Focusing on the success of your learners is even more important in a train-the-trainer session. You are going to train adults who will train other adults. (There's that meta thing going on again.) Adults bring to the table these attributes:

- They have a great deal of experience, and they should be encouraged to share their knowledge and skills.
- They have responsibilities, and they may think they have more important things to do than attend your training event.
- They strongly need to know why they should learn something and how it will help them cope with daily life.
- They harbor images of themselves as self-directing individuals who desire control of what they do.

A version of these concepts was first presented by Malcolm Knowles in his book, *The Adult Learner: A Neglected Species*, published in 1973. The wise trainer incorporates these concepts into any training that is designed or delivered. As the trainer, you will be successful if you are able to do these things:

- create a safe learning environment
- ensure that your content is transferable and solves participants' problems
- encourage participation
- treat your participants with respect and value their ideas
- prepare for any situation, so that you can easily meet all participants' needs.

Support Within These Two Covers

Each chapter has been designed mostly as a stand-alone discussion, so if you are an experienced trainer who needs good material to conduct a train-the-trainer session immediately, you can go straight to chapter 11, to see what we offer in the way of participant material.

The book is designed with you in mind. The initial premise of the book is that you have a group of individuals who need a complete train-the-trainer session that encompasses all of the steps in the ADDIE model. Alternative support emanates from that premise. For example, if you only need to provide information about data collection, writing learning objectives, or establishing a positive learning environment, you can just select the activities related to each specific topic.

The book provides all of the participant materials (called handouts, which are provided on the CD and in thumbnail form in chapter 11), the PowerPoint slides, and the Trainer's Guide to support the delivery of the three-day train-the-trainer or shorter sessions that you may require.

The book also includes support to you as a trainer, so you can plan and prepare for your success. You will find tips and guidance, as well as a step-by-step plan that will help you from start to finish. Here's a more in-depth description of what you will find in this book:

Chapter 1, "Finding Your Way Around: How to Use This Book Effectively": This chapter is an overview of the rest of the book. It gives you a vision of what's in store.

Chapter 2, “Prepare for Success”: Chapter 2 is all about preparation. It offers ideas to prepare the environment, both the physical setting of your room and the psychological setting for your participants. It also provides thoughts about how to prepare your participants and clients and, most important, how to prepare yourself for this or any other training event.

Chapter 3, “Tips for Successful Facilitation”: Need some tips for better facilitation? This chapter presents tips that you can use during various times of the training cycle. Pick up this chapter and start to read at any point to find a few ideas that you can use.

Chapter 4, “Planning and Preparing for Your Successful Session: How Do I Start?”: This is a giant to-do list. It starts from the time you know you will conduct the train-the-trainer and works you all the way through evaluation. This chapter makes the whole process easy to complete.

Chapter 5, “Trainer’s Guide: Presenting the Modules and Module 1—Introduction”: This chapter introduces module 1 and will help you initiate a successful program. It contains the welcome, objectives, and introduction to the content, as well as detailed step-by-step instructions to help you present the train-the-trainer activities for module 1, identify the equipment and material needs for these activities, and determine the amount of time these activities require.

Chapter 6, “Trainer’s Guide: Module 2—Assess and Analyze”: This module discusses the importance of assessing learners’ needs and ways to gather data. It identifies equipment and material, as well as the amount of time to allot for each activity.

Chapter 7, “Trainer’s Guide: Module 3—Design and Develop”: This module covers how a training designer, using the data gathered in the needs assessment, creates learning objectives. These objectives provide the foundation for creating a training program to help adult learners gain required skills and knowledge. Instructions are included to help you present the train-the-trainer, identify equipment and materials necessary for the activities, and determine how much time each activity requires.

Chapter 8, “Trainer’s Guide: Module 4—Implement and Facilitate”: This chapter contains module 4 of the train-the-trainer, which discusses how to facilitate the training session confidently and competently as you keep the focus on the learner. It includes a list of equipment and materials needed, as well as the amount of time to allow.

Chapter 9, “Trainer’s Guide: Module 5—Evaluate and Enhance”: The final module of the train-the-trainer presents the importance of evaluation, Kirkpatrick’s four levels of evaluation, and using what you learn to make improvements. Instructions help you identify equipment and material necessary for the activities, as well as how much time each activity requires.

Chapter 10, “Alternative-Length Delivery Modules”: This chapter offers suggestions for shorter modules you might consider for participants who do not need a complete train-the-trainer, but who might need to improve their delivery or to understand their training styles.

Chapter 11, “Participant Materials for a Complete Three-Day Session”: Chapter 11 is the complete set of participant materials, or handouts (as thumbnails), which serve as both activity sheets during the session and as resources following the session. Use this chapter as a quick reference to the handouts as you go through the materials. One feature of the materials is the “In Focus,” which contains about a half-dozen quick reminders, such as the Good Design ABCs or the 3Cs of a Great Trainer.

Further Reading and Resources: This list includes many books that cover all topics presented in this train-the-trainer, as well as a collection of activity and game books, e-learning books, books about creativity, and books about graphics and design for the trainer. In addition, you’ll find resources to help you purchase products such as assessment instruments; clip art; music; paper supplies; props, toys, and training tools; and movies. This section also includes information on licensing and copyright.

The Icons

Icons act as a quick reference. If you use the Trainer’s Guide (chapters 5–9) for training, the icons will remind you what you need to do during each activity. Here’s the list of icons used in this book:



“Materials or Equipment” indicates what is required to conduct the learning activity.



“Time” indicates the time required for specific activities.



“Lead-In” is the statement the facilitator makes to introduce a new section or activity.



“Process” refers to the steps to complete the activity; the steps are numbered.



“Handout” refers to the information sheets accompanying each module.



“PowerPoint slide” cues the facilitator to display a slide.



“Discussion” indicates that the facilitator will lead a large group discussion.



“CD” indicates materials that are found on the compact disc accompanying this book.



What's on the CD?

The materials on the CD are there for your convenience. The CD provides electronic versions of these items:

- the complete Trainer's Guide (chapters 5–9)
- the complete set of participant handouts for the three-day session (use selected handouts for shorter sessions)
- PowerPoint slides
- Session at a Glance (tables 1–5, one for each module)
- equipment and materials packing list
- flipchart preparation and flipcharts (for modules 3 and 4)
- “Team 2 Notes” memo for activity 2-6
- pairwise card set for activity 3-2
- table tent
- train-the-trainer evaluations (2)
- train-the-trainer certificates (2).

Terminology, Jargon, Lingo

It is difficult to select the correct words when you write for learning and development, or training of WLP professionals, or ... see what I mean? Readers come from many backgrounds. Some of you are steeped in International Society for Performance Improvement (ISPI) language. Others use Society for Human Resource Management (SHRM) terms. Performance supporters use still another vocabulary. Some people think they have the market on the exact words used. In actuality, the terminology doesn't really matter that much, as long as we can communicate and understand the concepts so we are successful at our jobs.

To set the record straight for those of you who have been around the profession for a while and to clarify the lingo for those of you who are new to the field, here's a list that may help:

Session. I have most often used the word *session*, and I have sprinkled in *workshop* or *program* a few times. You may also find a time or two where I say *the training*. In this situation, I refer specifically to the train-the-trainer training session that you will conduct, whether it is three days or three hours in length. I have also used words such as *learning event*, *performance improvement*, and even *learning*. I try to avoid *class*, *course*, or *education* because they sound pedagogical.

Participant. The individual who attends your *session* (see above). I use *participant* most often, but sometimes *learner* seems to be better in the context of the sentence. In other writing, you may see *attendee*, *stakeholder*, *trainee*, and even *student*. I highly recommend that you stay away from *student* because it promotes the concept that the trainer is the knowledgeable one; in fact, we know that is not the case. Our participants have a lot to teach us.

Client. The individual who funds, initiates, or otherwise requests or supports the training session. The individual may be the supervisor of all or some of the participants. For consultants, the client may be the person who hired you to conduct the training session.

Trainer. I tend to use *trainer* and *facilitator* interchangeably. I believe that a trainer must be both. The best trainer is one who uses facilitative skills; however, I do not believe that a facilitator must necessarily use trainer skills. It's a fine point, but I am happy to discuss it with anyone. I feel the same about the word *presenter*. At times, trainers need to be presenters, but presenters do not need to be trainers to be successful at what they do. I avoid using *instructor*, *teacher*, or any other term that leads back to the didactic model of learning. Other terms for trainers include *employee development specialist*, *performance analyst*, *competency expert*, *corporate trainer*, and *performance specialist*.

Methodology. This refers to the type of activities within the training modules that provide the participants with learning experiences. They include things such as role plays, case studies, games, reading, and relay races.

Training room. I actually prefer to just call it *your room*, but that may confuse those new to the profession or those who describe the location of the learning event as a *classroom*. In this book, I use *training room* most often, but sometimes it is awkward and I will revert to *classroom* (even though I don't usually use it when I speak). Some people use *facility* or *venue*.

Handouts. These are the participant materials that serve both as instructions for activities and as resources after the training is over. As a whole, these comprise the participant's manual. Because this book also offers shorter events in module format, all handouts are named and numbered for clear identification.

I am aware that some readers of this book may be new to the profession; therefore, most terms are either defined or self-explanatory. I spell out new acronyms in each chapter, in case someone begins to read the book in the middle. For example, you will see *subject matter expert (SME)* the first time it is mentioned in a chapter, and later I will just use *SME*.

Conclusion

Conducting a train-the-trainer is an honor. It means that you have reached a high level of competence in your career. Others are looking to you for guidance. Congratulations! This book will help you deliver a successful train-the-trainer.

What to Do Next

- If you are an experienced trainer and just need to find good train-the-trainer materials, turn directly to chapter 11, which contains the participant materials to chapters 5 through 9, which constitute the Trainer's Guide. You will find that the numbers and titles of the participant handouts align with the numbers and titles of the activities in the Trainer's Guide.
- If you are an experienced trainer looking for shorter modules for specific competencies, turn to chapter 10, which offers suggested modules for a variety of needs. You may also want to use the participant materials in chapter 11 to create your own modules.
- If you are relatively new to the profession and want some ways to improve your own skills, start with chapters 2 and 3. They discuss the importance of preparation and relate tips and tricks that will help you do a better job of training.
- If you are ready to get started but you are overwhelmed by the hundreds of pages in this book and on the CD, go directly to chapter 4. The step-by-step process will put you at ease. All you need to do is to begin to move down the checklist.
- If you are looking for more resources, turn to Further Reading and Resources, at the end of this book. It is comprehensive and up to date. For a book that aligns directly with the *Ultimate Train-the-Trainer*, pick up a copy of *10 Steps to Successful Training* from ASTD Press.