TRAIN THE TRAINER
VOLUME 1

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TIPS, TOOLS & INTELLIGENCE FOR DEVELOPING TALENT

FOUNDATIONS AND DELIVERY:

THE BASICS TO BECOMING A SUCCESSFUL TRAINER

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LEARNING & DEVELOPMENT

TRAIN THE TRAINER

VOLUME 1

FOUNDATIONS AND DELIVERY:

THE BASICS TO BECOMING A SUCCESSFUL TRAINER

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PRESS

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Basic Training for Trainers

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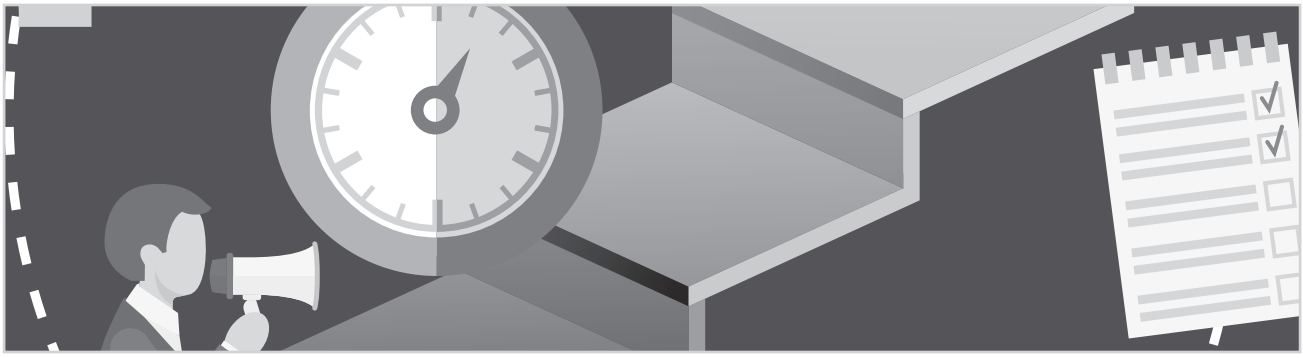
BASIC TRAINING FOR TRAINERS



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According to ATD's 2014 *State of the Industry* report, organizations spent on average $1,208 per employee on training and development in 2013, a 1 percent increase over the previous year. In 2014, the number of learning hours also increased slightly during that time period, from 30.3 hours to 31.5.

The need for adequate training may be greater now than ever, as the skills gap—which ATD defined in *Bridging the Skills Gap* as "a significant gap between an organization's current capabilities and the skills it needs to achieve its goals"—is substantial, both in the United States and globally. According to *Bridging the Skills Gap*, 84 percent of respondents reported a skills gap in their organization. The skills gap is present in not only STEM (science, technology, engineering, and math) skills, but also in communication skills, soft skills, and middle skills—those skills important in jobs that require more than a high school education but less than a four-year college education.

Bridging the Skills Gap respondents provided the following solutions: 64 percent answered that providing more training internally would close specific skills gaps, 55 percent suggested identifying core competencies and targeting their development, and 50 percent said examining what skills the organization needs to be successful now and in the future.

The talent development field has transformed substantially in the past decade. Four factors have played a major role in this:

1. economic uncertainty and volatility
2. advances in digital, mobile, and social technology
3. demographic shifts in the workforce
4. increased globalization.

In addition, neuroscience is playing an increasing role in how trainers approach their work and the environment that leaders try to create for their employees. For example, the PERMA model—which stands for *positive emotions*, *engagement*, *relationships*, *meaning*, and *accomplishment*—introduced by Martin Seligman, explains our level of well-being. More organizations are becoming more open to embracing these elements in their organization, as "The Positive Workplace" *Infoline* (available in volume 3 of the Train the Trainer series) highlights. Moreover, additional neuroscience research shows that learning environments should be low stress, enjoyable, and stimulating, as discussed in the "Memory and Cognition in Learning" *Infoline* (part of volume 1 of Train the Trainer).

Against this background, "Basic Training for Trainers" will provide a primer of the training landscape, including covering the following topics:

- the definition of a trainer
- the core skills a trainer needs
- training methods
- presentation and facilitation tips
- evaluating training
- the Four-Step Skills Training Method.

WHO IS A TRAINER?

It's a question with a surprisingly simple answer: Who is a trainer? Anyone who boosts the skills and knowledge of others. This can include such actions as showing a new employee how to file an electronic timesheet, demonstrating to co-workers how to use software, or teaching a person how to manufacture or test products to meet safety regulations.

Through instruction and practice, a trainer helps people:

- Gain new skills, knowledge, or behaviors.
- Acquire proficiency and awareness of products, processes, or methods.
- Achieve a defined or perhaps higher performance standard.

Trainers tend to focus their efforts in several areas:

- mandatory and compliance (such as safety and security)
- managerial and supervisory
- profession- or industry-specific (such as engineering, accounting, legal, and medical).

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BASIC TRAINER COMPETENCIES

The following list of competencies comes from the 2013 *ASTD Competency Study: The Training & Development Profession Redefined.* The focus is based on the applications necessary for competency in two specific areas of expertise, Training Delivery and Instructional Design. Trainers should attain a level of proficiency in each of these competencies.

Training Delivery

Deliver informal and formal learning solutions in a manner that is both engaging and effective. Be able to:

- Manage the learning environment.
- Prepare for training delivery.
- Convey objectives.
- Align learning solutions with course objectives and learner needs.
- Establish credibility as an instructor.
- Create a positive learning climate.
- Deliver various learning methodologies.
- Facilitate learning.
- Encourage participation and build learner motivation.
- Deliver constructive feedback.
- Ensure learning outcomes.
- Evaluate solutions.

Instructional Design

Design and develop informal and formal learning solutions using a variety of methods. Be able to:

- Conduct a needs assessment.
- Identify an appropriate learning approach.
- Apply learning theory, which encompasses the collective theories and principles of how adults learn and acquire knowledge.
- Collaborate with others.
- Design a curriculum, program, or learning solution.
- Design instructional material.
- Analyze and select technologies.
- Integrate technology options.
- Develop instructional materials.
- Evaluate learning design.

SOURCE: ADAPTED FROM ROTHWELL, W.J., J. ARNESON, AND J. NAUGHTON. 2013. *ASTD COMPETENCY STUDY: THE TRAINING & DEVELOPMENT PROFESSION REDEFINED.* ALEXANDRIA, VA: ASTD PRESS.

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But when is a trainer also a facilitator? Typically, we think of trainers as people who relay content, while facilitators focus on learning through a group process. Today, with myriad options available to learners, the lines have blurred, and a trainer often must act as a facilitator in order to transfer learning. So to be a trainer, you have to be a good teacher of content, and use a variety of appropriate methods to help a broad audience acquire new skills and knowledge effectively and efficiently.

LEARN HOW TO TRAIN

As a trainer, you must possess four basic areas of skills and knowledge:

1. learning theory
2. training methods
3. presentation and facilitation
4. evaluation.

For the purposes of this issue, we assume that you will present a packaged training program—one that was designed with an instructional systems development (ISD) model. See the What Is ISD? sidebar for more information on ADDIE and SAM, two popular instructional design models. In addition, we assume that you have a level of content mastery (see the Content Mastery sidebar for details). To begin your journey as a polished trainer, check out the basic competencies you'll need, found in the Basic Trainer Competencies sidebar and the Dos and Don'ts for the New Trainer sidebar.

ADULT LEARNING THEORY

A key aspect to a successful training program is understanding how adults learn and retain information. Generally, adults need active involvement, and they need to understand the relevance of the information to their job or organization in order for them to retain the information presented.

Malcolm S. Knowles, an adult-learning theorist, says that adult learners:

- need to see the relevance of the training to their own life experience
- learn best when they have a measure of control over their learning experience
- like to apply their own experience and knowledge to the learning
- benefit from task- or experience-oriented learning situations
- learn best in cooperative climates that encourage risk-taking experimentation.

What's more, adult learning is most effective when the learner can satisfy a personal goal or need. According to Knowles, adults will respond to extrinsic factors, such as promotions, job changes, or better working conditions. However, intrinsic motivators, such as self-esteem, recognition by peers, better quality of life, greater self-confidence, or the need for achievement and satisfaction, can be even more motivating.

Ultimately, remember that your objective is to increase performance through a change in behavior. The adult learner generally goes through the following four levels of learning to reach the level of behavioral change:

1. Awareness: Participant says, "I've heard that!"
2. Understanding: Participant recognizes the subject matter and then explains it.
3. Practice: Participant actually uses the learning on the job.
4. Mastery: Participant can use the acquired knowledge to teach others.

Learning styles and preferences, which have been a staple in the training industry for years, are now being questioned by some recent research. However, learning styles are still considered by many trainers to be an important way of keeping delivery style interactive and interesting.

TRAINING METHODS

Traditionally, trainers led instructive-style learning sessions. Many now believe that the facilitative or participatory training style—in which the trainer guides the learners to discover what they need to learn—is more appropriate for adult learners. This trainer-facilitated and learner-centered environment better suits the adult learning styles noted above.

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Jump-Start Your Learning Objectives

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Jump-Start Your Learning Objectives

ISD

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Objectives Made Easy

The key to effective lesson plans is well-written learning objectives. Once you know how to write good learning objectives, preparing the rest of your training program is much easier. Learning objectives create the framework on which many other training design decisions are based. They also establish a logical and cohesive sequence to the training program.

Many instructional designers agonize over writing learning objectives because they are so important to the training program's effectiveness. The end result is objectives that are overly complicated and confusing or too vague and hard to measure. It doesn't have to be this way.

Well-constructed learning objectives are specific, observable, and measurable. They define what the learners will do to learn and to demonstrate their learning. Your objectives signify the desired level of learning, which enables you to better select the appropriate training methods.

Effective learning objectives are based on the training needs of your learners. They incorporate not only what the learners will learn but also why they should care about the training. Because learning objectives delineate how learners will demonstrate what they have learned, they provide a basis for their own evaluation. As you can see, learning objectives affect nearly every stage in the training design process.

This *Infoline* shows you how to use a proven five-step process to design learning objectives. This issue includes practical worksheets, templates, and examples to help you easily and successfully create your own learning objectives.

You will learn how to

- conduct a needs assessment to identify possible training needs
- state training goals
- determine key content
- designate the level of learning required for the key content
- generate specific, observable, and measurable learning objectives.

Conduct a Needs Assessment

When you receive a request for training, the first response should be to investigate the reason for the request. You need to collect enough data to determine what performance issue needs to be addressed and, most importantly, whether training would be the best way to address the issue.

True training needs reflect performance issues that can be remedied through the introduction, practice, or reinforcement of specific and measurable knowledge and skill sets.

The training needs assessment begins the lesson design process. All of the other planning decisions regarding the learning objectives concern how best to meet the training needs.

The results of a training needs assessment will determine your training focus and your target audience, once you have concluded that training is the appropriate response.

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A useful needs assessment will answer the following questions:

- What performance issue needs to be addressed?
- How does this issue affect the organization?
- Why is training the appropriate remedy?
- Who is the target audience?
- What general content needs to be covered?
- How receptive are the learners to this content?
- What is the learners' level of skill or knowledge in this content area?
- Why is this training important to the learners from their perspective?
- How much time is available for this training?
- What pre-training and post-training reinforcement is necessary and available?

Identify the Training Needs

Use the needs assessment process to decide if training is truly the appropriate response. There will be times when an ineffective policy or a poor work environment causes substandard performance. A true need for training, however, is reflected by performance issues that can be remedied through the introduction, practice, or reinforcement of specific and measurable knowledge and skill sets.

If the assessment indicates that training is the best option, the results will help you determine the training needs—including the training focus and target audience. You will be able to identify what performance or behavioral issue you need to address.

The lesson design process begins with determining the training needs. All of the other planning decisions regarding the learning objectives concern how best to meet these training needs.

Know When Not to Train

As stated previously, when you receive a request for training, your first response should be to investigate the reason for the request. Collect enough data to determine what performance issue needs addressed, and most important, whether training is the best way to remedy the problem.

Dr. W. Edwards Deming, the quality management guru who is credited with Japan's economic recovery after World War II, stated that "85 percent of an employee's ability to perform successfully on the job depends upon the system." By the system, he meant the organizational structure, its policies and procedures, its culture, as well as its management style. Training cannot fix a poorly functioning system.

Occasionally, training is requested to address a performance issue that training will not resolve because the undesirable performance is the result of system deficiencies or a lack of supervisory management. Think about what else could solve the performance problem. Are the employees given all the equipment they need to perform efficiently? Are there certain policies or procedures that are outdated and inhibiting success? Applying training when it is not appropriate will only set up the training course and the learners for failure.

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In instances when you feel that training is not the appropriate solution, it is best to be up front with the client. Explain your opinion of the situation and why you think that training will be an ineffective answer. Offer some suggestions on how to remedy the situation without training. If the client persists, you may have no choice but to move forward with the requested training. But make sure your concerns are heard and understood.

For an overview of the entire learning objectives process, see the sidebar, *Five Steps to Easy Objectives.*

State the Training Goals

The training goals provide a high-level statement of the purpose for the training program. There should always be two stated goals:

- what the learners will learn
- why it is important to them.

You may be wondering about the reason for the second goal, which speaks to why the learners should care about the content. As a trainer, you are constantly marketing your training to your target audiences. Your goal statement will be part of the marketing literature for your training program. Participants are much more likely to attend a training that speaks to the WIIFM question (what's in it for me?) than one that simply repeats legal mandates or management expectations.

The training goals begin the actual design process. All decisions regarding the content to be covered in the training program will be based on these goal statements. The second part of the goal statement will ensure that a part of the training content focuses on obtaining participant buy-in.

Five Steps to Easy Objectives

Creating learning objectives doesn't seem so intimidating when you break down the process. Follow these five steps to achieve success.

1. Conduct the Needs Assessment
2. Identify the Training Goals
3. Determine the Key Content
4. Set the Required Level of Learning
5. Write the Learning Objectives

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The Learner-Centered Classroom

learning and development

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THE LEARNER-CENTERED CLASSROOM

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Oftentimes professionals find themselves responsible for leading classrooms without any formal preparation in instruction or classroom dynamics. They may be subject matter experts who are called upon to provide training for workplace learning, or they may be deep experts who choose to teach in classrooms of higher education. During the course of my career, I've worked with many people who find themselves in this situation, whether adjunct faculty, college professors, or guest speakers in training events. Many of them find the task daunting, and in preparing for the responsibility of providing and building dynamic classrooms, they are searching for a framework to help them understand the classroom and connect with the learners in it.

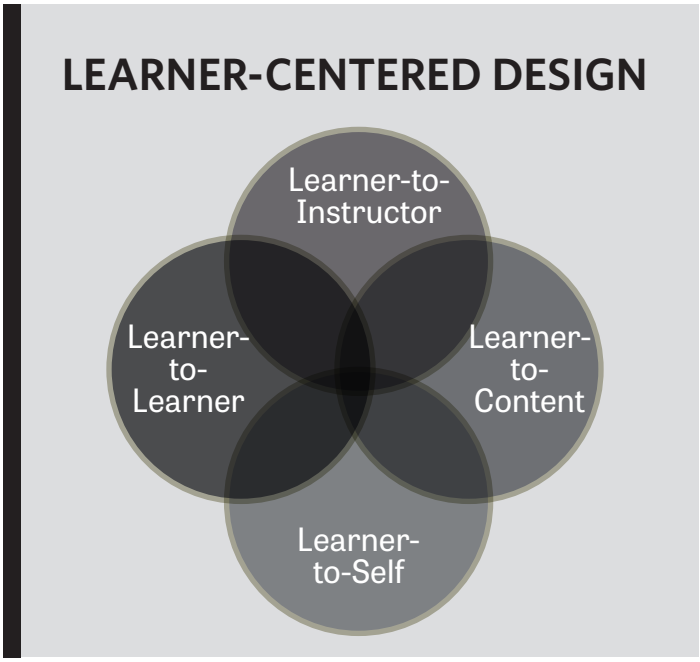
This *TD at Work* is written for both novices in search of a simple and meaningful way to develop their instructional skills and seasoned practitioners who are looking for a new or different way to freshen their instructional approach. This issue is also valuable to any learners who want to more fully engage with their classroom-based learning and encourage more balanced, learner-centered instruction.

Learner-centered instruction is an important and simple way for any practitioner to prepare a classroom that offers the best experience for the participant. When the learner—rather than the instructor—is the focus of the instruction, the learning becomes more meaningful to the participant, provides more opportunities for the learner to engage with the content, builds more connections to improve knowledge transfer, and encourages a variety of teaching methods within the learning event.

In a learner-centered classroom, the student takes ownership of the content, determines ways that it may be useful or relevant, and builds the relationships that will allow the learning to endure.

This *TD at Work* will show you how to:

- describe the four relationships within any classroom, whether online or face to face
- list different instructional techniques that will maximize the learning relationships within your classroom
- balance your approach to instruction so that your classroom is more learner-centered and learning-rich.



LEARNER-CENTERED CLASSROOMS: IT'S ALL ABOUT RELATIONSHIPS

Professionals who will be instructing for the first time often don't know where to start. It's not uncommon for their design conversations to begin with, "I have a great idea for an activity I want to use," or, "I have a PowerPoint with all of my content, and I'm planning to teach from that," and "I'm struggling with how to organize all the information; there is so much the students need to know!"

Deciding what to teach and how to teach doesn't have to be arbitrary. In addition to the many learning theories and models of instructional systems design from which to choose, there are other ways to think about instruction and the learning event. For example, I often look to the principles of design thinking to help me decide how to organize a classroom. Design thinking is inherently human centered;

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LEARNER-CENTERED CLASSROOMS

Rather than designing the classroom from the instructor's perspective, consider designing the classroom from the learner's perspective. Similar to the principles of human-centered design, this approach encourages the design of learner-centered instruction. In learner-centered classrooms, there are four primary relationships. Attending to each will allow for more meaningful, durable learning to occur.

1. **The learner-to-instructor relationship**: Consider how to develop a trusting and encouraging dynamic between each learner and the instructor.
2. **The learner-to-content relationship**: Consider how to develop a meaningful and sustainable connection between each learner and the material being taught.
3. **The learner-to-learner relationship**: Consider how to develop an interactive and supportive rapport among the learners in a learning event.
4. **The learner-to-self relationship**: Consider how to develop an honest and reflective bond between the learner and herself.

and empathy is at the core of human-centered design. Looking at the classroom from the learners' perspective and empathizing with how they experience the learning event is a practical and meaningful way for instructors to prepare their course. While it might seem nuanced, or too slight a difference to matter, putting the learner—rather than the instructor—at the center of the instructional experience makes all kinds of new relationships possible and expands the framework from which the instruction is designed.

LOOKING AT THE CLASSROOM FROM THE LEARNERS' PERSPECTIVE AND EMPATHIZING WITH HOW THEY EXPERIENCE THE LEARNING EVENT IS A PRACTICAL AND MEANINGFUL WAY FOR INSTRUCTORS TO PREPARE THEIR COURSE.

Learner-centered instruction offers a different way to have the conversation about how to teach and how to design a learning event. It takes an empathetic approach to learning from the vantage point of the participant. As the name implies, in a learner-centered classroom the design of instruction shifts focus from who will be teaching and what will be taught, to who will be learning and how they will participate. For those professionals who are not instructional designers or trained instructors, a learner-centered classroom can relieve a lot of pressure. If a subject matter expert has never led instruction before, she may be concerned about being the center of attention and anxious about being the sole authority in the classroom. Professionals who find themselves in these positions often remark, "I have deep subject matter expertise, but I don't know how to teach." Because learner—centered instruction changes the dynamics in a classroom, teaching is less important than learning. The learner experience is prioritized over the instructor experience, and relationships are the centerpiece of the classroom—not expertise. There are four primary relationships in the learner-centered classroom:

- the learner-to-instructor relationship
- the learner-to-content relationship
- the learner-to-learner relationship
- the learner-to-self relationship.

The Learner-to-Instructor Relationship

Of all the relationships within a classroom, the learner-to-instructor is perhaps the most obvious. From our formative experiences in education, most of us are familiar with hierarchical classrooms with the teacher in the front and the students in their seats. Typically, the instructor is the leading expert and the provider of information and knowledge. Teaching occurs when the instructor shares this information with, or transfers it to, the students.

Most adult learners arrive in the workplace or a higher education classroom with a similar expectation—they enter with a passive mindset

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and anticipate the interactions in a classroom to be unilateral. The instructor will pass on information through briefings, lectures, and presentations; these are the ways that the instructor demonstrates knowledge and mastery of the content. In exchange, the participants will sit passively and "learn."

In a learner-centered classroom, the instructor is still present and expertise of the content is still as important. The difference in approach is very slight. When designing for the learner-centered classroom, the instructor's first question is not, "What do I want to teach?" but rather, "What does the learner need to know?"

In the design of most learning events, the relationship between the instructor and the student is prioritized. Even so, the relationship between the instructor and the learner is likely the most perishable of all. It exists during the learning event, but has the fewest opportunities to meaningfully extend beyond that. It occurs, and is largely confined to, the time and space in which the learning event is scheduled. So, although most instructors invest considerable time in developing the learner-to-instructor relationship, it is the least durable of the four relationships that a learner might develop in a classroom.

SO, ALTHOUGH MOST INSTRUCTORS INVEST CONSIDERABLE TIME IN DEVELOPING THE LEARNER-TO-INSTRUCTOR RELATIONSHIP, IT IS THE LEAST DURABLE OF THE FOUR RELATIONSHIPS THAT A LEARNER MIGHT DEVELOP IN A CLASSROOM.

One key concept to remember when you are designing a classroom and focusing on the learner-to-instructor relationship is design thinking. It's not about "us versus them" or even "us on behalf of them." For the design thinker, it has to be "us with them." And I believe the same is true of instructors and learners. The human-centered learning experience should be collaborative and co-owned, jointly relying on the participation and contributions of both the instructor and the learner. Approaching the classroom from the student perspective best allows these dynamics to emerge, and the learner-to-instructor relationship deepens and broadens.

DEVELOPING THE LEARNER-TO-INSTRUCTOR RELATIONSHIP

Key questions to ask when advancing the learner-to-instructor relationship:

- Am I controlling the classroom discussion only to the degree necessary?
- Am I allowing opportunities for others to contribute to the discussion?
- Am I asking enough questions and encouraging participation?
- Is my inquiry open and honest?
- Am I tolerant of diverse viewpoints?
- Am I encouraging positive experimentation and generating a culture of optimism?
- Would I want to be a learner in this classroom?

The Learner-to-Content Relationship

The learner-to-content relationship is often taken for granted in the classroom. Because it seems self-evident that students are in a classroom to receive new information or develop a new skill, it is frequently assumed that the participant is learning; that the information is taking hold and the learner is making sense of the new material. What this approach lacks is a focus on what the learner needs from the content, as well as a verification of what meaning the learner has derived from the instruction. A learner-centered approach emphasizes the relationship between the learner and the content, and ensures that a meaningful connection has developed.

Cultivating the learner-to-content relationship requires that the classroom provides time and space for each learner to interact with the

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