

# 1

## An Introduction to Training



### Check What You Know

"I'm thinking about changing jobs," Justin told his colleague Rachael as they left their building to attend a meeting.

"I thought you liked your work," Rachael said.

"I do. But there's a trainer position opening up in the Learning and Human Performance Department, and my manager said that she'd support me if I wanted to apply for it. She knows that I'm looking for something more challenging, and that I'd like more opportunities to work with people."

"So you'd be teaching?"

"That's part of it. But according to the job description, it involves lots of other things, too."

They reached the door of the meeting room. "When do you have to decide?" Rachael asked.

"The application deadline is next Thursday. But I need to find out a lot more about training before I can figure out whether I've got what it takes and whether it would be the right move for me. At this point, all I've got is an idea and a list of questions."

*(Continued)*

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What could you tell Justin about training? Some of his questions are below. How would you answer them?

1. What is training? Is it the same thing as education? What are the key differences?

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2. What's the primary purpose of a training program?

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3. What does a trainer do? What are a trainer's roles and responsibilities?

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4. What skills and characteristics does a trainer need?

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By the time we enter the workforce, we've spent years in the classroom. We know how to do research, study, take tests, and write papers. We have learned a little about a lot of subjects, and a lot about a few subjects. We have learned how to do many things, a few of them very well. All that education has provided us with a good foundation for living our lives and launching our careers. But learning doesn't stop when we leave school. In fact, few of us could do our jobs on the basis of our education alone. For us to become proficient at our work and productive members of our organizations, and to continue developing our careers, there is a great deal more that we need to learn. That's where training comes in.

Here's what you'll learn in this chapter:

- What training is
- Why organizations need training
- What trainers do
- What qualities and characteristics a person needs to be a successful trainer

## 1. What Is Training?

According to human resources guru Dr. Leonard Nadler, "Training is learning that is provided in order to improve performance on the present job."

There are two implications in that statement. The first is that the current performance needs to be improved—there is a gap of some sort between what a person knows and is currently able to do and what the person needs to know and be able to do. The second is that the learning is not for some future use but is to be put to use immediately.

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### THINK ABOUT IT



Which of the following would you consider training?

- A. \_\_\_ A class in the basic principles of psychology.
- B. A tennis lesson.

(Continued)

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- C. A workshop on how to conduct hiring interviews.
- D. A seminar in art history.
- E. An online tutorial in using Excel.
- F. On-the-job coaching in closing a sale.



You probably identified the tennis lesson (A), the workshop on conducting hiring interviews (C), the Excel tutorial (E), and the coaching for closing a sale (F) as training. Those experiences are intended to bring about an immediate change in the learner's performance. For example, people take tennis lessons because there is a gap between what they are able to do on the tennis court (get their serve in only once in a while) and what they want to be able to do (get their serve in more often). They attend an interviewing workshop because they need to close the gap between what they already know (how to be interviewed for a job) and what they need to know (how to interview someone else for a job).

Speaker, author, and master trainer Bob Fike says it succinctly at the opening of his book, *Creative Training Techniques*: "The purpose of any training program is to deliver results. People must be more effective after the training than they were before."

To put it another way, we might say that the purpose of training is to help people learn something they need to know or be able to do for a specific purpose—to achieve organizational objectives and goals, carry out specific tasks, prepare for new responsibilities, or attain their career goals. You might take an art history course for the pleasure of learning to look at art, or a class in the basic principles of psychology as the foundation for future learning. But you would probably take an Excel tutorial only if you needed to use the application to accomplish a specific goal, such as preparing a budget, and you would probably get coaching in closing a sale only if you needed those techniques to be better at your job.

When you think about it, you already know what training is—you've been through training, and you've been a trainer. Has someone taught you how to drive a car or plant a garden? You've been through training. Have you ever showed someone how to balance a checking account or prepare a holiday meal? You've been a trainer. Even though the subject matter and the learning

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methods differ widely, successful training programs share certain distinct characteristics:

- *They effect change.* They help people increase their knowledge, learn or improve their skills, or change their attitudes in order to change the current situation and achieve a desired outcome.
- *They are designed to achieve specific goals.* Those goals are the learning objectives that describe what people will be able to do as a result of training: “When learners complete this program, they will be able to [get their serve in 70 percent of the time] [conduct hiring interviews that meet legal requirements] [use Excel to prepare a budget] [ask questions to uncover a customer’s needs].”
- *They are learner-centered, not trainer-centered.* The trainer’s primary role is to be a guide for the learning process, not an expert who imparts information to passive learners.
- *They are designed to engage learners actively in the learning process.* The program uses interesting, relevant activities that help people discover new concepts, skills, and information and relate what they already know and have experienced.
- *They are relevant to the learners’ real world.* The program focuses not on theory but on practical information, concepts and skills that learners can use immediately.
- *They have measurable outcomes.* The degree to which the program is successful in achieving the desired outcome can be observed or measured in some way

## 2. Why Do Organizations Need Training?

*All HR professionals must be prepared to get the most out of a workforce that is growing ever more diverse and to attract and retain the most highly skilled workers in an increasingly global knowledge and skills market.*

Society for Human Resource Management (SHRM),  
2006 Workplace Forecast

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## Check What You Know

Why do you think organizations devote valuable resources to training? What do they get in return?

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Training requires lots of resources—time, money, equipment, materials, facilities, expertise—that could be used for other purposes. Yet 62 percent of organizations surveyed in the 2006 Society for Human Resources Management Workplace Forecast reported that they were investing more in training and development. Even in tough economic times, although organizations may try to reduce costs by seeking more efficient ways to train employees, they continue to invest in training activities.

According to the 2006 Accenture Workplace survey, a company's workforce is increasingly important to business success. Training is essential for an organization to achieve its goals. Clerks in a retail store need to know how to process sales and treat customers in a way that makes them want to return. Airline mechanics need to know how to maintain and repair planes so they are safe to fly. Managers need to know how to give employees the clear expectations and feedback they need to be productive and help the organization achieve its strategic goals. Loan officers need to understand and follow ever-changing regulations. Even during belt-tightening times—*especially* during such times, when there is no room for inefficiency and waste—training can significantly affect an organization's ability to succeed by helping people communicate more effectively, work more productively, and be more innovative.

Here's some of what training helps organizations do:

- *Develop and retain a leaner but more productive workforce.* Today's organizations are trying to compete and differentiate themselves in the marketplace by doing more with less. That means fewer, but more productive, employees. Improved performance improves productivity. It's that simple.

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- *Keep up with the rapid pace of technological change.* Technology has changed the way we work, and the technology we use keeps changing—in fact, it often seems that just as we’ve mastered one software application or electronic device, another comes along and the learning process starts up again. No matter what the industry, people need ongoing training so they can make the best use of technology to help the organization stay competitive and achieve results.
- *Be more flexible.* We live in a rapidly changing world, and successful organizations are those that can respond quickly to changing situations. Organizations need to be flexible enough to respond to change quickly and effectively. Training that helps team members learn one another’s jobs provides that kind of flexibility; so does training that helps improve employees’ ability to be creative and innovative.
- *Understand cultural differences.* Today’s companies need to find ways of being competitive in a global business environment. They also need to ensure high productivity among an increasingly diverse workforce. To accomplish those goals, they need to provide training that helps people understand and respect cultural differences and communicate effectively with people from diverse cultures.
- *Prepare new employees to do their jobs.* New employees at McDonald’s and Starbucks go through training programs before they make their first hamburgers or caramel lattes. New bank tellers learn the bank’s procedures before they handle customer transactions, and loan officers learn banking regulations before processing their first loan applications. In addition to sales skills, newly hired sales representatives need an in-depth understanding of the organizations’ products. New employees in every industry need to learn their organizations’ employee policies. Whether the training is done informally on the job, on a computer, or in a classroom, new employees need a significant amount of training just to get started. The better the initial training, the more rapidly the new person will become a productive member of the organization’s workforce.
- *Prepare people to take on new responsibilities.* Once a new employee has settled into the job, the organization is likely to want that person to take on new responsibilities, perhaps even to move into another job. Just as training is essential for newly hired employees, training is needed to prepare people for new and different responsibilities so they can make a greater contribution to the organization’s success.

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- *Attract and retain the best employees.* Organizations invest a great deal of money in hiring a new employee and preparing that person to be productive. To get a reasonable return on that investment, they need to find ways to encourage the best people to stay. Talented people have options about where they work, and today's workers expect opportunities to grow and develop. Organizations with good training and development programs are more attractive to job-seekers because they provide those opportunities. In fact, the availability of those programs can mean the difference between keeping or losing a good employee.
- *Comply with governmental requirements.* Many industries must comply with various federal, state, and local laws and government regulations. Many of those requirements are subject to frequent change, and companies can face serious consequences for failing to follow them. Thus, employees need ongoing or periodic training to make sure that they understand and abide by the laws and regulations that apply to the work they do.
- *Improve internal and external customer service.* Meeting customer needs is the reason that most organizations exist. The better able employees are to meet—and exceed—customers' expectations, the more successful the organization is likely to be. Employees need training that ensures they are able to provide their internal and external customers with excellent service.
- *Help organizations manage change.* Change is a fact of life—in fact, it is one of the few things we can all count on. At the same time, people tend to resist change and even to feel threatened by it. They often prefer to do things in familiar ways even when those ways are no longer productive; they might even continue to do things that no longer need to be done. Training can help people cope with change and provide new information and skills so that they can respond positively to changing situations and needs.
- *Improve and maintain quality.* Customers, whether internal or external, expect a certain level of quality from an organization's goods and services. Poor quality can have severe consequences—defective products can cause injuries; lack of attention to detail can lead to a botched surgical operation, a nuclear plant accident, or a banking crisis. Poor quality can cost companies a great deal of money—recalling products, correcting errors, losing customers. Organizations need ongoing training to keep the quality of goods and services at levels that keep people safe, keep costs under control, and maintain their competitive advantage.

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### 3. What Do Trainers Do?



#### Check What You Know

The job description for the training position Justin is considering states that the successful candidate will be part of the team that provides training programs for all of the organization's employees. What tasks and responsibilities do you think that job description might include?

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Some jobs seem relatively clear-cut: a mechanic fixes things, an engineer designs things, a sales representative sells things. You might think that the job of "trainer" falls into the same basket—trainers "train" or "teach" people to do things. That's true, as far as it goes. You could also say that trainers "help people learn what they need to know to perform their jobs in a way that helps the organization achieve its goals" or that they "help individuals develop their skills, increase their knowledge, and enhance their competencies." Still, even those broader descriptions of what trainers do only hint at the spectrum of responsibilities that trainers may have. Although teaching, or facilitating learning in a classroom, can be a significant part of a trainer's job, many trainers are involved in or responsible for other aspects of the training function as well. In fact, some people whose job title is "trainer" or "training specialist" never even set foot in a classroom.

The trainer's role differs widely from organization to organization, and often within organizations. Trainers' responsibilities depend on a whole range of situational factors, including the size of the organization, the type of industry, the organizational commitment to training, and where the responsibilities for meeting training needs lie. In a small company, the same person who handles hiring and employee benefits might be

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responsible for all the training, whereas large corporations usually have distinct departments that are devoted to training and employee development. In some organizations, trainers' responsibilities are limited to planning and delivering programs that are designed and developed by others; in others, the same people design, develop, and deliver training. Sometimes all an organization's training is delivered by internal trainers, who work for the company; in others, managers, subject-matter experts, and/or external consultants also deliver training.

When people first start out in the training field, chances are that they will be responsible for only a portion of their organization's training function. But since a trainer's responsibilities are likely to grow over time, it's important to understand all of the things that trainers do. Here's an overview:

- *Identify training needs and determine how to meet them.* All training programs start with a need, real or perceived. Trainers conduct needs assessments that help organizations determine which needs can be met by training and what type or types of training would be the most effective and efficient ways to meet specific needs.
- *Develop or find programs to meet specific training needs.* Trainers develop the learning objectives that form the foundation of a training program. They then design and develop—or find and adapt—training programs and materials that will help people achieve those objectives.
- *Deliver live training.* Trainers plan, prepare for, deliver, and follow up live, in-person workshops and virtual training programs.
- *Administer and support self-directed and on-the-job training.* A large percentage of training is being delivered on the job and in self-directed formats. Trainers help learners get started, provide guidance and support as they work, and track their progress.
- *Evaluate training success.* An important part of a trainer's job is to determine whether a training program achieved what it set out to achieve and identify changes that might be needed to improve it.
- *Make the business case for training.* To achieve their goals, organizations need continually to examine their activities to determine the real value of the investments they make, and training is no exception. Increasingly, trainers are called on to demonstrate the value of training to the organization's bottom line so that the organization knows whether its investment, including the time that people spend in training, is worthwhile.

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## 4. What Makes a “Good” Trainer?

*Keen listening and sensitive observational skills are two of the most essential attributes of a successful trainer.*

in T.L. Gargiulo, A.M. Pangarkar, and T. Kirkwood (Eds.),  
*The Trainer’s Portable Mentor* “Introduction to Section Two”



### Check What You Know

**Suppose** you were hiring a new trainer. Do either or both of the following candidates appear to be good candidates for the job? Why?

1. Danielle has a master’s degree in journalism and an undergraduate degree in art history. For three years after college, she worked at a local museum setting up exhibits, planning events, leading tours, and writing a monthly newsletter. During college, she has spent several summers running art programs at a community center for which she also wrote several successful funding proposals. She enjoys playing chess and she coaches her son’s soccer team.

Good candidate? Why?

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2. Jason graduated at the top of his university class with a B.S. in computer programming. After college, he worked as a website developer for a small consulting firm, where one of his sites won

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awards from a prestigious organization. For the past two years, he has been working on his own as a web designer and search optimization specialist for a variety of clients that include small businesses and nonprofit organizations. A competitive tennis player during college, he occasionally teaches tennis classes at a recreation center. Since high school, he has also done standup comedy for parties and clubs.

Good candidate? Why?

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Both Danielle and Jason possess several characteristics that would make them good candidates for a training position—but neither has all the characteristics that a trainer might need. That’s because we’re all better at some things than at others. Some of us are good at art, others at math. Some prefer to work with people, while others prefer working alone. Some are good at planning, others at execution. But like other professionals, the most successful trainers, and the ones who enjoy their work the most, have certain qualities and characteristics that have drawn them to the field. For example, every successful trainer I know communicates exceptionally well, sincerely likes working with people, and truly enjoys the process of learning.

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## THINK ABOUT IT



In addition to communicating clearly, working well with people, and enjoying the learning process, what other qualities and characteristics does a trainer need to be successful?

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I've never met a trainer who exemplified all the qualities and characteristics in the list below. But successful trainers possess most of them to some degree, and they work diligently to improve or compensate for what they consider to be their more challenging areas.

- *Good communication skills.* The essence of a trainer's job is to get information across to others in a way that helps them learn. That means being able to communicate verbally, nonverbally, and in writing. Training professionals need to be able to convey information clearly and concisely – and they need to know how to listen. They need to know when to speak, and when to remain silent, how to encourage others to speak, and how to end a discussion. They need to know when and how to ask questions. Communication skills can be learned and improved, but because communicating is so vital to a trainer's job, the most successful training professional are people who truly enjoy communicating.
- *Enthusiasm for learning.* Scratch a trainer, and you'll usually find someone who loves to learn. That's good, because trainers are in a constant learning mode. Every new project brings a new challenge and a new learning curve. For most trainers, part of the fun is learning about subjects they

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would never have understood if they had not needed to teach them. In addition, trainers are continually challenged to learn more about the complex, rapidly changing field of training and to find ways in which they can improve their professional skills.

- *Creativity.* Training solutions are seldom simple. Trainers must consider a variety of factors—including limited resources—when deciding how to meet a specific need, and what works for one project might not work for the next. The most successful trainers are those who think creatively so they can go beyond obvious solutions and find innovative, cost-effective ways to help people learn.
- *Flexibility and the ability to think on one's feet.* People who like things to be pretty much the same day after day may find training a difficult field. Trainers need to be able and willing to change direction on a dime and respond quickly to the unexpected. The most successful trainers are those who can let go of what's not working, adapt quickly to change or new information, and deal with the challenges that are likely to come up just as they think that everything is under control.

*Training is a profession. It requires constant energy output.*

*If you tire quickly, become discouraged easily, or become frustrated if things do not go according to plan, training may not be for you.*

Elaine Biech,  
*Training for Dummies*

- *Energy and enthusiasm.* Training is not a passive sport. It requires the active involvement and attention to detail that comes from being interested in what you do and caring about doing it well. Trainers who bring a contagious energy and enthusiasm to their work energize learners and stakeholders alike.
- *Good organizational, resource-management, and time-management skills.* Training is a constant juggling act—training professionals need to keep lots of balls in the air at the same time if they want to achieve results. Like any other project, training requires the ability to plan, stay on track and help others do the same; find and use resources; and make the most productive use of available time.

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- *The ability to work well with others.* Just as staging a theatrical production, putting on a conference, or getting a new product to market requires the collaborative efforts of a group, training is a team activity. Successful trainers don't hide away in cubicles; they engage with others to share ideas and solve problems so that the training programs they provide meet participants' needs and the organization's goals.
- *Good research, analytical, and problem-solving skills.* Someone once told me that training reminds them of putting together a puzzle without a picture. I agree—and that's one of the things I like about it. Most trainers, in fact, enjoy the challenges involved in figuring out how the puzzle goes together

### ASTD Competency Study

The American Society for Training and Development (ASTD) has conducted extensive research into the roles, functions, and characteristics of people in the training field. ASTD's 2004 Competency Model for Learning and Performance describes three categories of foundational competencies—skills, knowledge, abilities, and behaviors—that a successful training professional needs to have or to develop. Those categories are interpersonal, business/management, and personal.

*Interpersonal*—Be able to build trust when interacting with others; communicate effectively; influence stakeholders and gain their commitment; leverage diversity and work well with diverse individuals; and network and partner to establish collaborative relationships

*Business and management*—Be able to analyze needs and propose solutions; apply business skills to understand business goals and build the case for investments in learning; drive results by identifying and achieving goals; plan and implement assignments; and think strategically.

*Personal*—Be able to demonstrate adaptability in the face of change and model personal development by continuing to learn and grow as a training professional,

For more information on this model and ASTD's other research in the training and development field, visit [www.astd.org](http://www.astd.org).

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## Characteristics of Successful Trainers

- The ability to communicate verbally, nonverbally, and in writing
- An enthusiasm for learning
- The ability to think creatively
- Flexibility and ability to think on one's feet
- Energy and enthusiasm for what they are doing
- Good organizational, resource-management, and time-management skills
- The ability to work well with others
- Good research, analytical, and problem-solving skills
- Good people skills
- An enthusiasm for challenge
- Patience
- A good sense of humor

and find satisfaction in the process of seeking information, putting the pieces together, and coming up with the right solutions.

- *Good people skills.* Trainers work with people and for people—and a great variety of people, at that. Those who are drawn to training as a career usually enjoy being with people, are able to listen well, can easily establish rapport, are able to empathize, can see things from other people's points of view, and are able to appreciate and respect people's differences.
- *Enthusiasm for challenge.* Training is not for the faint of heart. Every day in a trainer's life brings new challenges, many of them completely unexpected. Instead of seeing challenges as something to be avoided, successful trainers welcome them as learning opportunities.
- *Patience.* Things are not accomplished overnight in the training world (nor, usually, in any other world). Some things just take time, and impatience can easily lead to oversights and mistakes that can doom a training

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program. Trainers need the ability to be patient with themselves, as well as with others and with the vagaries of the situation.

- *Good sense of humor.* Trainers don't have to be comedians, or even to be able to pull off a joke (I'm not very good at that myself). But the ability to lighten up tense or difficult situations by being able to laugh at themselves and with others can be a valuable attribute for trainers. At the same time, trainers need to be able to recognize when humor, or specific kinds of humor, are out of place.

## Quick Quiz

List the three to five key learning points from this chapter that will be most helpful to you.

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## What's Next?

A training professional's primary responsibility is to help people learn. That requires an understanding of the ways in which they learn, the differences between different types of learners, and the differences between different types of learning. That's what you'll find in the next chapter.



### Apply What You Learned

Is training right for you? What are your strengths and challenges? On the assessment on pages 20 and 21, circle the number in the right-hand column to indicate how you rate yourself on each item. Then use the space below to summarize your responses to the rating. Think about these questions:

- Did anything surprise you? What?

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- What are strengths do you bring to the training field?

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- What are your biggest challenges? If you were to start a development plan today, where would you focus?

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## Answers to Exercise

### THINK ABOUT IT



Which of the following would you consider training?

- A. \_\_\_ A class in the basic principles of psychology.
- B. X A tennis lesson.
- C. X A workshop on how to conduct hiring interviews.
- D. \_\_\_ A seminar in art history.
- E. X An online tutorial in using Excel.
- F. X On-the-job coaching in closing a sale.

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## Self-Assessment

Quality, Characteristic, or Skill

1. I am a good communicator.
2. I have enthusiasm for learning.
3. I am creative.
4. I am flexible and able to think on my feet.
5. I am energetic and enthusiastic about training.
6. I have good organizational, resource management, and time-management skills.
7. I work well with others.
8. I have good research, analytical, and problem-solving skills.
9. I have good people skills.
10. I enjoy challenges.
11. I can be patient.
12. I have a good sense of humor.

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