

Pfeiffer Essential Guides to Training Basics

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INSTRUCTOR'S GUIDE

ABOUT THE SERIES

In today's fast-paced, competitive, and highly technological environment, training professionals face the continuing challenge of finding innovative, cost-effective ways to provide training to a rapidly changing and highly mobile workforce. Based on the author's years of experience as a training professional, as well as the experiences of many other training professionals, the *Pfeiffer Essential Guides to Training Basics* offers both new and experienced trainers a wealth of practical ideas, information, tips, tools, and techniques to help them acquire the skills, information, and attitudes they need to do their jobs successfully.

The Books

- *Training Fundamentals* provides a practical, no-nonsense introduction to the field of training, including what training is, what a trainer does, the adult learning principles that form the foundation of successful training programs, an overview of training program design, a guide to training terminology, and a guide to developing oneself as a training professional.
- *Designing and Developing Training Programs* is a comprehensive guide to instructional design, including a proven step-by-step process that helps training professionals provide training that effectively and efficiently meets specific needs.
- *Delivering Training Workshops* includes the detailed information trainers need to be able to plan, prepare for, deliver, and evaluate workshops that help participants achieve specific

objectives, including how to prepare themselves and their audience for training; deliver information clearly; keep the audience engaged; use visual aids, and handle any symptoms of nervousness.

Each of the three books in the series is built around many of the elements that make up a good training program, including:

- Anecdotes and examples drawn from real-life to help readers grasp the content
- Suggestions and guidance to help readers apply what they learn to projects of their own
- Questions and brief exercises (with answers supplied) to help readers think about the content and relate it to their own situations
- Tips, checklists, worksheets, and self-assessments

HOW TO USE THE BOOKS IN THE CLASSROOM

Because the books are designed to help people learn, you can draw on the exercises in each chapter for both in-class activities and assignments. Here are a few more suggestions:

- Ask students to read chapters before class, do the in-chapter exercises, and come prepared to discuss what they have learned.
- Assign “field work” – ask students to come up with a training project for an organization with which they are associated, apply what they learn to that project, and report on the results.
- Assign a chapter or part of a chapter to small groups of students. Ask the groups to come up with discussion questions and activities so they can teach the material to the rest of the class.

- Ask small groups of students to use the information in the books to design and deliver a short training program on a topic of their choice to the rest of the class.
- At the end of each book (or periodically during the course), ask students to develop and submit action plans for applying what they have learned.
- Ask students to find an existing training program, critique it (what's working and what's not), and redesign it so it meets the criteria in the books.

CONTENT OVERVIEW

Below and on the following page you will find summaries of the key points from each book. Note: There is some overlap between some of the material in *Training Fundamentals* and in the other books, which expand on topics that are first presented in that book.

TRAINING FUNDAMENTALS

Designed for those who are new to the training field as well as those who are considering training as a career, this book covers the basics that any training professional needs.

Chapter 1. An Introduction to Training

- The purpose of training is to help people learn something they need to know or be able to do for a specific purpose, such as to achieve organizational objectives and goals, carry out specific tasks, prepare for new responsibilities, or attain their career goals.
- Successful training programs share certain characteristics: They effect change; are designed to achieve objectives that describe what people will be able to do as a result of training; are learner-centered, not trainer-centered; engage learners actively in the learning process; focus

not on theory but on practical information, concepts and skills that learners can use immediately; and have measurable outcomes.

- Training helps organizations develop and retain a leaner but more productive workforce; stay competitive and achieve results; be flexible enough to respond to change; improve communication with people from diverse cultures; prepare new employees to do their jobs; prepare people for new responsibilities; attract and retain the best employees; comply with governmental requirements; provide excellent customer service; maintain a high quality of goods and services; and keep costs under control.
- Depending on the size of an organization, the type of industry, the organizational commitment to training, and where the responsibilities for meeting training needs lie, a trainer's responsibilities might include identifying training needs and developing or finding programs to them; developing learning objectives; designing and developing training programs and materials; delivering training workshops; administering and supporting self-directed and on-the-job training; evaluating training success; and making the business case for training.
- A successful trainer needs keen listening and observational skills; good communication skills; an enthusiasm for learning; creativity; flexibility and ability to think on one's feet; energy and enthusiasm; organizational, resource-management, and time-management skills; good people skills; research, analytical, and problem-solving skills; and a good sense of humor.

Chapter 2. What to Know About Teaching Adults

- Adults want to make their own decisions and take responsibility for their own learning; need to make connections between what they are learning and what they already know; expect to

be able to use what they learn, see its relevance to their goals, and understand how to apply it; respond primarily to internal motivators; and learn best when their experience and knowledge is valued and they are seen as equals in the training environment.

- In learner-centered training, the trainer is a guide who is responsible for creating and maintaining an environment in which people are able to learn. Learner-centered trainers create an environment where people can try things out, make mistakes, get feedback, and try again; respect learners' diverse needs and learning styles; focus on relevant outcomes and help people see how learning will benefit them; help participants become actively engaged and involved in the learning process; provide feedback and positive reinforcement; and help people apply the learning to real-world situations.
- There are various theories that describe the ways in which people learn. One theory describes four primary types of learners: Activists, who like to experiment, explore, and discovering; Reflectors, who prefer watching and listening; Theorists, who like to think things through, analyze them, and evaluate them; and Pragmatists, who prefer solving problems and seeing how what they learn applies to the "real" world. Another model postulates that we have three primary sensory receivers: Vision, Auditory, and Kinesthetic (VAK), and still another suggests that each person relies on one or two out of eight different "intelligences," or skills, to solve different kinds of problems.
- Considering our differences, training programs that combine different types of media, presentation methods, and activities are likely to increase learning and retention for greater numbers of people.

Chapter 3. Designing Training Programs

- To avoid wasting resources on training that doesn't do the job, is unnecessary or costs too much, many training professionals use some form of a model known as ADDIE, which stands for the key steps in the design process: Analysis, Design, Development, Implementation, and Evaluation.
- *Analysis.* Determining the reasons for undertaking the project, the likelihood of achieving the desired results, and what it will take to move from idea to reality.
- *Design.* Writing the learning objectives; determining how training will be delivered; identifying content; planning the learning activities; and deciding how the program will be evaluated.
- *Development.* Creating or managing the development of the materials needed to run the program.
- *Implementation:* Scheduling training and notifying participants; arranging for materials, equipment, and training rooms; preparing for training; and delivering the program.
- *Evaluation:* Determining how well the program helps participants meet the learning objectives.

Chapter 4. Deciding on Delivery Options

- There are three types of learning programs: Synchronous training, in which people are learning at the same time; asynchronous training, in which they are not necessarily learning at the same time; and combinations of the two.
- In synchronous training, participants can communicate and interact with the instructor and one another in real time. Synchronous training includes classroom training, or workshops;

on-the-job training; study groups; and live virtual training conducted in a web-based training room.

- In asynchronous training, there is no real-time interaction between learners and between learners and trainer. Participants complete instructor-delivered assignments or self-paced lessons in e-learning programs, on the Web, or in printed materials at times and locations of their own choosing.
- To decide what delivery system or combination of systems to use, trainers need to ask such questions as what is the program intended to accomplish? What do participants need learn? How much interaction, practice, and feedback do they need? What's the time frame? What resources are available? Where are participants located? How many people are to be trained? How often will the program be repeated? What preferences have managers, decision-makers, and/or participants expressed?

Chapter 5. Developing a Training Program and Planning the Program Evaluation

- Developing a training program, usually the most time-consuming part of the instructional design process, includes identifying and organizing the content; selecting or designing learning activities; organizing the elements into a logical structure; developing or purchasing materials; testing the program and making necessary changes; and designing the program evaluation.
- Trainers might use an existing or off-the-shelf program when development time is limited; they don't have the necessary expertise; or there is an excellent program that is ready to use. But it can take more time to update and revise an existing program than to develop a new one.

- Trainers tend to include more content than can be covered in the available time. To decide what to include, they need to determine exactly what people need to know or be able to do to achieve each of the learning objectives.
- Learning activities are the instructional methods used to communicate the content and help people learn, including lectures, discussions, demonstrations, debates, role plays, practice exercises, simulations, case studies, games, field trips, readings, assessments, interviews, and peer teaching. The activities depend on such factors as the objectives; the type of subject matter; the delivery method; the learners' characteristics and preferences; the time, equipment, facilities, and resources that are available; and the trainer's expertise.
- Many useful learning experiences follow some form of experiential learning, which draws on adult learning principles to help people learn through discovery. Experiential learning activities commonly have five key steps: experiencing, sharing, processing, generalizing, and applying.
- In a logically sequenced training program, each topic and activity builds on what's come before and forms the foundation for what is to come next. The learning objectives often determine the sequence. Activities that might take learners out of their comfort zone should be preceded by activities that establish trust
- The first few minutes of a workshop can significantly affect people's ability to learn. The closing prepares them to take what they have learned back into their workplace.
- The agenda that includes an overview of the topics, the sequence in which they'll be covered, and the timing serves as a working outline for developing program materials.

- A pilot, or test, provides valuable information that helps to identify what changes might need to be made. Not testing a program can result in wasted time and money, along with frustration and loss of credibility.
- The basis for evaluating program success is established when the training needs are identified and the learning objectives developed. Programs are commonly evaluated on four levels: Level One: How satisfied were the participants? Level Two: How much did participants learn? Level Three: What change in behavior occurred as a result of the program? Level Four: What were the results of training? Some program evaluators also consider the impact of training on business results.

Chapter 6. Implementing Training Programs

- Preparing for a workshop typically includes scheduling the training; selecting and notifying participants; reserving the room and equipment; planning the room setup; preparing or obtaining materials and supplies; confirming arrangements and making contingency plans; and preparing to conduct training. Trainers might not do all those tasks themselves, but they need to make sure that the tasks get done.
- Scheduling a workshop requires considering how soon the training needs to be held, when the participants, the facility and the necessary equipment are available, and how soon the materials can be ready, among other factors.
- The way in which people are notified about a training program can affect their ability to learn. To stimulate their interest and begin the process of engaging them, they need to understand how the training will benefit them.

- Participants should be comfortable and able to see the trainer, one another, the flip charts, and the screen (for slides). Reservations for rooms and equipment should be made well ahead of time and confirmed before the workshop.
- To increase their confidence, project a self-assured image, reduce nervousness, and keep the workshop running smoothly, successful trainers prepare carefully for every workshop; make contingency plans in case something goes wrong; get there early so they can set up, greet people when they arrive, and start on time; make eye contact with participants; keep an eye on the time; manage discussions to stay on track; and handle problems right away.

Chapter 7. The Language of Training

- Like any other industry, the field of training has its own unique “language.” An understanding of the language of training helps aspiring trainers communicate with other training professionals, read about training topics, and build credibility in the training community.

Chapter 8. On Becoming a Training Professional

- Training professionals find satisfaction in being good at what they do, continually developing their skills and abilities, advancing in the field, and being part of the training community. They continually seek out best practices and new methodologies; see learning as a lifelong pursuit; build on their successes and learn from their mistakes; welcome challenges; meet their commitments; keep confidential information to themselves; and respect the work of others.

- The experience, expertise, and education that trainers bring to the field, which form the foundation for their training career, might include a prior career in education; informal opportunities to teach; everything they've learned in school, college, workshops, and on the expertise in a specific subject area; and their hobbies and special interests.
- To learn more about training and develop their skills, trainers can take courses on topics related to the training field; stay informed about best practices and new developments in the field; read about training-related topics; get a degree in a field that's related to training; become certified as a trainer; become active in the training community; attend conferences; find a mentor; observe trainers in action; and volunteer to apply their skills as a trainer.
- Training professionals need realistic action plans with timetables to help them achieve their career goals.

DESIGNING AND DEVELOPING TRAINING PROGRAMS

Building on the basics in *Training Fundamentals*, this book guides readers through the instructional design process, providing practical ideas, information, tools, and strategies they can use immediately. Readers are encouraged to apply what they learn to a real, current training project of their own.

Chapter 1. The Training Plan

- Today's organizations have an increasing need for training, but planning is essential to avoid wasting valuable resources without achieving a worthwhile outcome. Careful planning helps instructional designers identify what change is needed (and *whether* it is needed), what the outcome of change will be, how important it is to achieve that outcome, whether training is the best way to achieve it, and what exactly needs to be done to moving from idea to reality.

- The ADDIE process (Analysis, Design, Development, Implementation, and Evaluation) – has the structure and the flexibility to keep instructional designers on the right track and make sure that projects achieve the desired goals.
- Analysis: One of the most important reasons for the analysis stage is to determine what change is needed, how important it is, and whether there is an easier, less costly way than training to achieve it. The information gathered in this stage provides a solid foundation for the entire project, shaping its scope and direction.
- Design: The design document, an outline that serves as a guide for developing a program, describes what people will be able to do when training is completed; the training methodology; the content the program will cover; the activities that will be used to help people learn; and the ways in which the program will be evaluated.
- Development: It can take days or weeks of work to develop and test a one-day workshop, and weeks or months to develop e-learning modules. To use time, money, expertise, and other resources efficiently, it's very important to begin with a detailed, well-thought-out program design.
- Implementation: The tasks range from scheduling training, arranging for equipment and facilities, notifying participants, preparing for training, and delivering the program. Instructional designers are not always involved in this state of ADDIE.
- Evaluation: Ongoing assessment and evaluation is crucial to making sure that training is relevant, effective, and providing a good return on investment, as well as to help the organization improve existing programs and develop more effective training in the future.
- ADDIE is a means to an end. Trainers won't necessarily do the steps in order, they might not do all of them and they may go back to earlier steps in light of new information. For the

process to work best, they need to pay enough attention to analysis; get accurate, complete, and current information; involve everyone who needs to be involved; when coming into a project that's already underway, make sure the program design is sound; and be willing to change direction when things change or they get new information.

Chapter 2: Analyzing the Situation

- Carefully analyzing an apparent training need allows designers to make informed decisions about whether change is really needed and whether training is the best way to achieve it.
- There are two general categories of needs assessments: “organizational” needs assessments, which are large-scale analyses of changes in knowledge, skills, and attitudes that are needed for an organization to achieve its goals, and “training” needs assessments, which are more focused analyses intended to determine whether training is the best way to meet a specific need. Full-scale organizational needs assessments are usually conducted by experienced training and organizational development professionals. Trainers are more likely to be involved in the less-complex needs assessments that takes place when someone has identified a real or perceived need for change.
- Questions asked during a training needs assessment generally include: What change is needed, and why? What will happen if nothing is done? What are ways in which desired outcome could be achieved? How urgent is the need? Who are the stakeholders? What factors are likely to affect the ways in which the desired outcome is achieved? What are the characteristics of the audience for training? Who needs to be involved in the design process?
- Common methods for gathering information include interviews; focus groups; online surveys and questionnaires; tests; assessments; and observation. Trainers should use the information

to clarify and confirm the original assumptions; determine the urgency of training; learn about the audience; identify limits on the design options and choices; involve key people; determine whether to build a new program or revise or purchase an existing in-house or off-the-shelf program.

Chapter 3: Writing Learning Objectives

- Learning objectives are written descriptions of the situation that will exist when training has been completed. Objectives help designers select content, activities, methodology, media, and materials; focus on what's important; evaluate training success; and provide a clear purpose for the learners.
- A learning objective describes what learners will be able *to do* when training is completed; uses behavioral, measurable terms and action words; describes performance; and may include the conditions and standards for performance.
- Useful learning objectives are relevant and meaningful and describe something that learners can reasonably be expected to do as a result of training. To write learning objectives, designers draw on all the information that they collected during the analysis and gather more information as needed. In addition to terminal learning objectives, they also write enabling objectives that describe what learners need to be able to do and/or know to achieve a learning objective.

Chapter 4: Choosing the Delivery Method

- Designers need to understand all the delivery options so that they can choose methods that are most likely to achieve the desired outcome and provide a reasonable return on the investment.
- Types of synchronous training include live, in-person and virtual workshops, which offer immediate, face-to-face interaction, are flexible, and can be put together quickly; on-the-job training; and study groups. Asynchronous training includes self-paced print, such as a workbook; self-paced training delivered on a computer or a mobile device; and podcasts, videos, and “webinars.” Combining methods into a blended learning program helps designers create cost-effective programs that meet both the requirements and constraints.
- To select the right delivery methods, designers ask such questions as: What is the training expected to accomplish? Do participants need learn or improve skills, acquire knowledge, and/or change attitudes? How many people need to be trained and what are their responsibilities? How often will the program will be repeated and how likely is it to change? When does training needs to be completed? What resources are available? Can learners be easily brought together for training? What are the stakeholders’ preferences?

Chapter 5: Identifying Content

- In learner-centered training, content decisions are guided by the question: What facts, concepts, processes, procedures, skills, attitudes, rules, guidelines, techniques, and best practices do learners need to know to achieve the objectives?

- Some designers select the content first, others design or select the activities first, and many swing back and forth, seeking activities to teach specific content and content people need to be able to do specific activities.
- One way to select content is to tackle one learning objective and the related enabling objectives at a time: (1) Consider the desired outcome and the learners' characteristics; what learners already know; and what learners need to know and be able to do to achieve the objectives; (2) Look for themes, natural groupings, and key topics; and (3) Develop a rough content outline, noting possible activities.

Chapter 6: Designing Learning Activities

- To involve and engage learners, activities should help them relate what they are learning to what they already know, get them thinking and reflecting, help them learn through discovery and from one another, and provide opportunities for practice. Every activity should have a clear purpose that is directly related to a learning or enabling objective.
- To select activities, designers consider the type of learning; the purpose of the activity; the available resources and time; the activity's relevance; the instructor's qualifications to conduct the activity; the group size; the level of engagement the activity provides; and the timing of the activity in the program.
- In an experiential activity, instead of being told something, learners discover it themselves. Experiential activities have, at a minimum, an introduction that prepares learners for the activity; the activity itself; a "debrief" that helps learners process what they have learned; and an opportunity to think about how to apply the learning.

- Activities for a training program can include brief “one-way” lectures and interactive lectures; structured discussions; observations and demonstrations; role plays; case studies; questionnaires and assessments; games; practice exercises; and simulations.

Chapter 7: Structuring a training program

- Structuring a workshop or other training program may require determining the sequence of topics and activities; planning the opening and closing; checking the timing; identifying visuals, media, and training aids; preparing a detailed agenda; and identifying the materials that need to be developed or obtained.
- The sequence of topics and activities should foster learning. When deciding on a sequence, designers should consider the learning objectives; the fact that people learn by building on what they already know; the need for people feel safe before they can take risks; and the need for variety in pacing, activities, and presentation.
- The opening should stimulate the learners’ interest, let them know how the workshop will benefit them, and engage them actively. The closing should reinforce the key learning points, give learners the chance to ask questions; encourage learners to make a commitment to action; and help learners feel a sense of accomplishment.
- When trainers run out of time in a workshop, there is probably too much content, too many activities, and too many objectives. The designer needs to estimate how much time is needed for each part of the program, including breaks, lunch, transitions, and “lag” time and revise the program to fit the available time without reducing participant involvement.
- Visuals help trainers capture and hold people’s attention; convey information more quickly; increase understanding; and reinforce, emphasize, and illustrate points. When used properly, visuals make a workshop more interesting and increase people’s ability to learn; when

overused or used inappropriately, they can be annoying, distracting, and even interfere with learning.

- Developing a preliminary agenda helps designers make sure that everything flows smoothly and each topic and activity has a clear purpose; double-check the timing and make necessary adjustments; and make sure that they've identified the necessary visuals, media, and training aids for each point in the workshop.

Chapter 8: Creating Materials And Validating The Program

- A training materials work plan keeps designers and developers organized so that everything gets done. The plan should specify the required materials, indicate where specific items will come from, establish deadlines, clarify responsibilities, and serve as a checklist during the development process.
- Handouts and workbook pages provide information participants need before, during, or after the workshop. More than five or six handouts should be organized into a folder, binder, or workbook, with numbered pages and, perhaps, a table of contents. Materials need to be easy to read, have a clean, neat, professional look, and a limited amount of essential information. "Nice-to-have" can be put in an appendix or delivered electronically after the workshop.
- Trainers need easy-to-use materials that help them plan, prepare for, conduct, and follow up the workshop, ranging from an at-a-glance agenda to a detailed trainer's guide. The extent and complexity of trainer materials depends how much the trainers are likely to know about the subject; how difficult the program is to deliver; whether the trainers are part of the design team and thus familiar with the program; and the trainers' experience in delivering programs.

- PowerPoint slides add interest to a presentation, reinforce key learning points, provide examples to illustrate important points, and help people learn. Every slide should support, reinforce, or illustrate something specific, and every slide should be clear and legible.
- “Validating” or “piloting” the program by running through some of the key activities with a small group of colleagues, conducting a full-scale test with learners from the target audience, or something in-between, helps designers make sure the program works so they can make necessary adjustments before rolling it out. The more important the program and the more people to be trained, the more important it is to do at least some level of validation.

\ Chapter 9: Evaluating the Results

- Although Evaluation is at the end of the ADDIE acronym, the process begins when designers identify the desired outcome and write the learning objectives that establish the criteria for success. Ongoing evaluation provides critical information that informs decisions about whether to continue a program and whether to change it in any way. Otherwise, ineffective, even unnecessary programs, can continue to be run for months or even years.
- Professor Donald Kirkpatrick's commonly used Four Levels of Evaluation is based on four key questions: Level 1: How satisfied were the participants? Level 2: How much did they learn? Level 3: What change in their behavior occurred as a result of the program? Level 4: To what degree was the desired outcome achieved? Dr. Jack Phillips added a fifth question: Were the benefits of this training worth the cost?
- Level 1 evaluations, which are the most common, and the most subjective, focus on how well participants thought the program met their needs, how they thought the trainer did, how well the activities helped them learn, and what changes they suggest for future groups.

- Level 2 evaluations, which seek to measure how well participants achieved the learning objectives, can be conducted using written and performance tests; questionnaires, assessments, and surveys; observation of performance and/or the results of performance; and/or interviews. They are more time-consuming; require a baseline against which to measure change; and evaluate what people have *learned* – not necessarily how well they can or will *apply* what they learned.
- Level 3 evaluations, which assess how well participants apply what they learned, can be done only after some time has passed and require directly observing on-the-job performance or the results of performance; interviewing managers, colleagues, customers, and others; and/or detailed surveys. Even so, it can be difficult to identify the reasons why people have failed to change or improve their performance.
- Level 4 evaluations, which seek to determine how well training achieved the desired outcome, can be difficult to conduct: it's hard to collect the right information; there needs to be a clear baseline against which to compare the results; and it's hard to separate out which results were due to training and which to other factors. But this level of evaluation is important if organizations want to be sure that they make the best use of scarce resources.
- Few training programs are evaluated on the basis of return on investment, because such an evaluation requires calculating all the myriad costs of designing, delivering, and following up the training program and then quantifying the program benefits.
- To determine which levels of evaluation to use, designers ask such questions as: How often is the program likely to be repeated, and for how many people? Is there a baseline against which to measure success? Is the information provided by the evaluation likely to be worth

the cost of obtaining it? Is there sufficient expertise to conduct evaluations beyond Level One?

Chapter 10: Designing Distance Learning Programs

- Because of the changing ways in which people work, the globalization of business, and advances in technology, distance learning is becoming increasingly prevalent.
- Distance learning options include advanced teleconferencing that allows remote learners to participate in a live workshop; live virtual (web-based) workshops; print and electronic self-paced programs; webinars, or online presentations; audio and video podcasts; mentoring and coaching via the telephone, e-mail, and/or in online meeting rooms; and chat rooms, online discussion groups, wikis, and blogs
- To decide when to use distance learning options and which options to use, designers consider the budget; how quickly training needs to be delivered; what technical expertise is available; the size of the audience for training; and the subject matter.
- The design principles for distance learning are the same as for any other training program. The key differences are in the way the program is structured, the types of learning activities, and the program materials.
- When designing a successful distance learning program, designers need to keep the focus on the learners, not the technology; vary the activities; make the instructions crystal-clear; include check-ins, questions, and assignments; present content in manageable “chunks”; and adapt the visuals to the medium.

DELIVERING TRAINING WORKSHOPS

Chapter 1: Preparing For a Workshop

- Trainers who neglect to prepare carefully for a workshop risk appearing less professional and credible, may have difficulty establishing rapport, and may not be able to set up an environment that is conducive to learning.
- Preparation tasks include scheduling the workshop and planning the learning environment; selecting and notifying participants; producing and obtaining materials and supplies; preparing participants for training; preparing to conduct training; and making contingency plans. Trainers might not do all the tasks themselves, but they need to ensure that those tasks get done. The more organized they are, and the more attention they pay to the details, the better the chances of achieving their goals.

Chapter 2: Scheduling the Workshop and Planning the Learning Environment

- Some important factors to consider when scheduling a workshop are how soon training needs to be held; when both participants and facilities are available; what times of year and days of the week should be avoided; whether there is something going on that could distract participants' attention; how much time is needed to prepare and obtain essential materials and supplies; and when any guest speakers, subject matter experts, or special equipment will be available.
- Many training programs are time-sensitive - training needs to be delivered by a certain time so participants are prepared for new policies or regulations or to solve an urgent problem. But it can be difficult to find dates on which all the participants, facilities, materials, and equipment can be available.

- The physical environment can have a significant impact on how well people in a workshop are able to learn. Good training rooms are the right size, well-lit, the right temperature, well-ventilated, private, quiet, flexible, and accessible to all participants. Trainers need to decide how to arrange the seating so that participants can see, hear, and communicate easily with one another; where to place flip chart easels, the projector and the screen, and other equipment; where they will stand to address participants; where they will put their trainer's notes or script, materials, and supplies; and where to put the refreshments.

Chapter 3: Preparing Participants to Learn

- An understanding of why people are attending a workshop helps trainers determine what they need to know before participants arrive and how to prepare them to get the most out of training. Before training begins, trainers need to let participants know why the workshop is being held; what content will be covered; how the learning will benefit them; and how the topic relates to their own experience.
- When possible, trainers should make a personal contact with participants to provide that necessary information and establish a friendly, positive, professional tone for the workshop. Pework – brief, relevant assignments that participants complete before a workshop – can help to engage them in the learning process and get them thinking about the topic.
- Training is more likely to be successful when participants' managers support it. If possible, trainers should try to meet with managers to clarify the purpose and objectives for the workshop, discuss what they expect training to achieve, help them understand how the training will be useful to them and their employees, and suggest ways in which they can prepare employees for training and support their efforts to apply the learning on the job.

Chapter 4: Preparing Materials and Supplies

- The way a trainer handles materials and supplies conveys an indelible impression of the workshop and themselves. Leaving everything to the last minute is likely to convey a sense of disorganization and lack of attention that can distract participants from the learning process and keep the workshop from flowing smoothly. Trainers who pay attention to preparation and are ready to go when participants arrive appear more credible; they convey a sense that they care about the workshop and take it seriously – and so should the participants.
- Trainers need to leave enough time in their schedule so they can prepare everything without cutting corners, sacrificing quality, or forgetting something important; use a checklist and a to-do list to keep themselves organized; make sure handouts present a professional image and are easy to use; order equipment and materials well ahead of time; keep basic supplies handy so they don't have to start from scratch for every workshop; make sure others who are helping them prepare know what is needed and when it is needed; and make backup plans in case something is missing on workshop day.

Chapter 5: Preparing Yourself

- The symptoms of presentation fear can take even the best, most experienced trainers completely by surprise. The most effective way for trainers to reduce that fear and cope with its symptoms is to be as prepared as possible by getting to know the workshop; becoming familiar with the subject; learning about the audience; thinking about their appearance; and practicing their delivery.
- A thorough understanding of the objectives, content, activities, and workshop structure lets trainers deliver training smoothly and with confidence. But to feel confident that they can explain the concepts clearly and answer participants' questions, trainers might need to learn

more about the subject than what's in the trainer materials by reading about it; attending a live or web-based presentation, seminar, class, or workshop; watching a video or listening to a podcast; or consulting with subject matter experts.

- The more trainers know about the participants, the better able they will be to deliver training in a way that meets their needs. Two ways to learn about participants are talking to them individually or in small groups or using a questionnaire to gather information about their expectations and concerns.
- Most people feel more confident and comfortable when they feel that they look their best and are dressed appropriately for the situation. Trainers should choose their clothing ahead of time, trying everything on and moving around, and dress professionally, but appropriately for the group, in comfortable clothing that does not call attention to itself.
- Practice pays off in terms of greatly increased self-confidence, far less anxiety and nervousness, and a more successful workshop. It's best to err on the side of too much practice, especially when trainers are new to training, the material is difficult, and/or the stakes are high. Trainers should practice with the notes or script, visual aids, media, and props that they'll be using and practice out loud and on their feet, in the training room and in front of other people if possible.

Chapter 6: Getting Started

- What people see and experience when they arrive in the training room and during the first few minutes of a workshop sets the tone for the entire session. Trainers need to arrive early enough to set up so they can make people feel welcome when they arrive and start on time; establish rapport, trust, and credibility right away; let people know what to expect and help

them see the value of the training; help people get to know one another; and involve people right away.

- Arriving at least an hour before the scheduled start time lets trainers do such tasks as check the room set up, supplies and materials, and equipment; post prepared flip chart pages; and make themselves comfortable in the space.
- A polite, friendly, personal greeting goes a long way toward helping people feel comfortable and establishing a positive impression of what is to come.
- Starting a workshop late not only means that trainers have less time to get through all the items on the agenda, it's unfair to those participants who do arrive on time. But it can be a challenge to get everyone there on time.

Chapter 7: Delivery Skills

- The symptoms of anxiety and nervousness can strike without warning. Some reasons are that trainers aren't as well prepared as they thought they were; feel unsure about their grasp of the subject matter; have little experience standing up in front of a group; feel that the stakes are unusually high; or they are unusually tired or not feeling well.
- Steps trainers can take to reduce and control symptoms of anxiety and nervousness including learning enough about the subject to feel confident answering participants' questions; anticipating and planning for things that might go wrong; taking care of themselves; spending enough time in the training room to make it their own; arriving early enough to greet people as they arrive; making eye contact with participants; moving a little as they speak; and, if necessary, acknowledging their nervousness.

- A significant part of communication is through body language: posture, movement, facial expressions, and gestures, which can reinforce what trainers say and convey sincerity or send the message that their words shouldn't be taken seriously.
- To avoid misunderstandings and keep from making people uncomfortable, trainers need to be aware that some body language, facial expressions, and gestures don't necessarily convey the same things to people in other cultures.
- Trainers need to speak loudly enough so their voice carries to the people at the back of the room, at a pace that lets people follow what they say; use a conversational tone that communicates the meaning, not just the words; choose words that participants can easily understand; and pronounce words clearly and distinctly.
- To improve their delivery, trainers need to learn what they sound like when they speak and identify necessary changes; check to make sure that participants can hear you; consider the needs of non-native English speakers; and think about whether the audience is likely to understand technical terminology associated with the subject.
- The more facile trainers are with the equipment, visual aids, and media, the more professional they will appear and the more confidence they will project.

Chapter 8: Helping People Learn

- When seeking the best ways to help people learn, trainers need to remember that adults need to be actively engaged and involved, see the relevance of what they are learning, have opportunities to try things out and make mistakes, feel that they can experiment without being judged or found lacking, and have different learning preferences.
- Open-ended questions – those that cannot be answered with “yes” or “no” - engage people in the learning process by stimulating discussions, helping them discover key learning points,

and helping them relate their own experience and knowledge to the content. Participants' responses to questions also let the trainer focus the workshop more closely on their needs.

- Individual and small-group activities help participants learn through discovery and practice new skills and techniques. The trainer's role is to facilitate that learning by making sure that people understand how to do the activity and remaining available to monitor and support them as they work.

Chapter 9: Managing the Learning Group

- One of a trainer's primary responsibilities is to maintain an environment that is conducive to learning. That means keeping the workshop on track, encouraging everyone to participate, and handling difficult participants so they don't make it difficult for others to learn.
- To keep things moving and stay on track, trainers need to get started on time, keep their eye on the time and the agenda, and get people back on time from breaks; manage discussions so they do not go on too long and stop activities when the time is up; leave some "wiggle room" in the agenda; and decide what drop or do more quickly if they start to run behind.
- To encourage even reluctant or unwilling people to participate actively, trainers can help them understand why they are learning; demonstrate respect for their knowledge, skills, and experience; demonstrate respect for their knowledge, skills, and experience; watch for clues that someone has an issue or might need special attention; create a safe environment in which people can take risks; and use a seating configuration that encourages participation.
- To handle behavior challenges, trainers can help the group establish rules that deal with behavior and invoke them as needed; set up a "parking lot" for side issues; deal right away with challenging behavior that is interrupting the workshop or making other participants

uncomfortable; focus on the behavior, not the person; and always treat people with respect, no matter how badly they behave.

Chapter 10: How to Close and Evaluate a Workshop

- The closing of a workshop is an essential part of the learning process. The final activities should help participants pull together the key learning points, recognize what they've achieved, and transfer the learning to the workplace.
- Tasks to be accomplished during the closing include reviewing the key learning points; addressing questions and unresolved issues; identifying next steps; making action plans and commitments; recognizing and celebrating success; and eliciting participants' comments about the workshop.
- People are far more likely to apply the learning if they have developed a written action plan and made a public commitment in to taking those actions. A useful action plan describes concrete steps, includes a realistic deadline, and is also be limited in scope.
- Workshop evaluations provide valuable information about how what's working well and what might need to be changed. Evaluations can be as simple as asking participants a few questions about how well the workshop met their needs or as complex as calculating the organization's return on its investment.