INNOVEST SME
Accelerating Small Business

Training *the* Trainers

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Live as if you were to die tomorrow. Learn as if you were to live forever.

GANDHI

PREFACE

Whether you are preparing to be a professional trainer, or you are someone who does a bit of training as a part of their job, you'll want to be prepared for the training that you do. This book will give all types of training tools to help create and deliver engaging, compelling workshops that will encourage trainees to come back for more.

Knowing is not enough; we must apply. Willing is not enough; we must do.

JOHANN WOLFGANG
VON GEOTHE

CHAPTER ONE

UNDERSTANDING TRAINING AND FACILITATION

Depending on the need of your participants, you may be called to provide training, or facilitate a discussion of ideas. This chapter will help to determine which approach you need in a particular situation.

WHAT IS TRAINING?

Learning can take many forms, and in terms of training, our goal is to bring about a behavioral change in something that we do. Training is not an event, where we attend a workshop one day and expect the desired behavior to take place the next day. Training is really a process. It begins before our participants even sign up for a class and continues right up until the new knowledge, skills, and attitudes are applied regularly.

Training includes:

The purpose of training is to deliver results. We make training available when we want to improve performance in some way, because we believe that it will help to move an organization from where we are right now, to where we want to be.

Presenting is something that can take place in training or a meeting, and your presentation skills come with you. If you are one of those people that get complimented because you have great speaking skills, good pacing, and quality materials, then you already have great presentation habits. On the other hand, if you are someone that tends to mumble if you are tired, or you don't inject inflection into your voice, then you can develop those skills.

Sometimes trainers rely on their presentation skills to get a point across, but not all training is presenting. A lot of training is delivered in other ways, such as demonstration, case studies, exploration activities, games, and guided practice.

WHEN DO WE NEED TRAINING?

Lack of performance does not always mean that there is training needed. There are several areas to consider BEFORE even looking at training as a consideration.

Determine the type of need.

- Is there a gap between high and low performers? If so, what is one group doing that the other isn't?
- Is there a real opportunity for improvement? We like to think, especially as trainers, that there is always something to learn and room for growth. In looking at the gap you have just identified, is there room for that growth to take place?
- When you have new products, equipment, or regulations, the indication for training may be very clear. Try to provide training early so that there is no slowdown in performance as the changes take place.

Who needs the training?

- Identify the level of the organization that is being impacted by the need you identified in Step 1. Problems or deficiencies can exist specific to an individual or to a job.
- Future planning may mean that an entire shift of people or an organization need training, which would be the case if you are opening a new plant, for example.

Make sure that you need training.

- If the gap really exists because of performance issues, attitudes, or capacity for learning, then training is not what you need. Despite what we may like to think, we cannot train all people to do all things.

Do the systems support you?

- We can train people for all kinds of things, but if the systems in place don't support your training, performance will not improve. If Jean finishes her work every day by 3:00 in the afternoon, and you continually scan the office to see who is behind and give extra work to Jean, she just might eventually learn to make her work extend until 5:00 anyway, so that you stop giving her that extra work.
- Does Jean need training to improve her performance? Of course not. Jean was being punished for performing well since there was no incentive for getting more work done than everyone else. In addition to that, the other staff was being rewarded for their slower performance since Jean was picking up the slack.
- While her colleagues might benefit from training that helps them be more efficient, the other aspect to consider is that Jean needs an incentive to do more than the minimum daily expectations.

Would coaching suffice where training is considered?

- Sometimes people don't actually need a full training program. A supervisor with skill in identifying gaps and providing coaching could potentially provide the support that is needed in 10-minute sessions of focused coaching. Sometimes our employees just need their concerns addressed, questions answered, or a skill demonstrated.

- Sometimes we tell supervisors that they are now coaches, but they may not know how to coach. They may not understand what a powerful tool coaching is, and so it's up to you to help them. (Could your coaches use some training?)
- On the job coaching (and training) can be a very good return on your investment, rather than long training sessions. Coaching can provide that "just in time" support that provides the employee with the information that they really need to move ahead.

What is Facilitation?

Whereas a trainer can have knowledge that participants do not have coming into a workshop, a facilitator may not have the same knowledge or expertise in the particular subject matter that the participants do. The role of the facilitator is to provide an experience in sharing, discussion, learning, and openness for participants. As a result, although we may use the terms trainer and facilitator interchangeably at times, there are tangible differences.

Can you think of some possible differences?

Identifying Appropriate Situations

A facilitator uses their knowledge of group processes and dynamics when planning their meeting. They might make use of their skills to run a meeting or a workshop where participants are considering problems, addressing pressing business needs, or planning for the future. Just like in skills training, a facilitator needs to have an agenda, specific objectives, and a plan for how the meeting will go.

Facilitating requires the following basic skills:

- Make sure everyone participates
- Make sure everyone understands the problem(s) being addressed and is focused on them
- Protect participants from any kind of backlash or abuse by creating and maintaining a safe environment

Provide regular check-ins and follow-up within the session. When people get involved in a facilitated group, they need to know whether they are still on track and that they are making progress. In addition, they need frequent interaction with the facilitator to inject energy, keep them on track, and also to allow some of what they do to sink in.

One way to bring it all together is to check in with the group and record their progress on a large flip chart or whiteboard at the front of the room. This will facilitate guided discussion, mind-mapping, and exploration. Keeping the group focused and together in this way also helps to foster the cohesiveness of the group.

Learning is not
a spectator sport.

D. Blocher

CHAPTER TWO

GATHERING MATERIALS

A major aspect of your training is recognizing what your participants need, want, and expect, and then responding accordingly. This chapter will explore some ways to identify participants' needs and adjust your material accordingly.

IDENTIFYING PARTICIPANTS' NEEDS

A good needs analysis has three basic steps.

Understand who your participants are. Your training is designed specifically to meet the needs of every person in the workshop, right? The answer is yes, of course it is, but there are others who require consideration before you deliver your course. These people include:

- The supervisor or manager who has identified a need for training. Find out what their expectations are for the training, and be sure to incorporate those items into your session.
- Who is paying for the training? This might be the trainee, the supervisor, or a manager in a different department altogether. What are their expectations of training, and what outcomes will they insist on?

If you can meet the needs of your participants (all three of them), you are much more likely to achieve success in your training, and to be asked to return for more training!

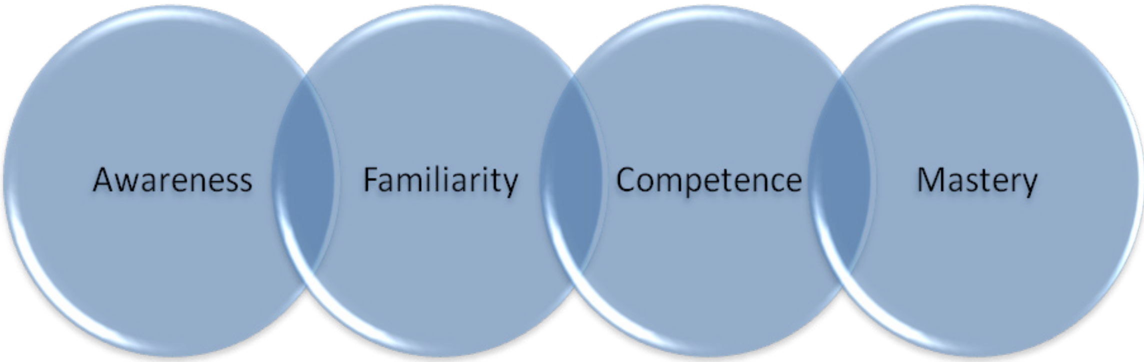
You'll also have to determine whether all of the concerns outlined by the participants, supervisors, and payers are real needs. This should come to light in your needs assessment.

Conducting a needs assessment is the best way to determine what your training needs to include. For example, a manager may come to you and say that staff in the contact center are consistently talking too long on the phone and yet not making enough sales. They need training on closing and time management. When you speak to the customer service representatives, they may tell you that they keep their calls as short as possible; however, they cannot seem to shorten the call and still make a sale. They also feel that they need training in closing and time management. Since both groups have identified the same problem in their interviews, you may think that you need to provide training in closing the sale and time management. However, if you also spend a day observing the high performing and low performing CSR's, you may find that they both spend their time in exactly the same way, but the difference is just in the closing.

As a result, you determine that training is needed on closing sales, not time management. Since the CSR's and their supervisors perceive that time management is also an issue, you will want to devote some energy to that topic, but your main focus is going to be on closing sales.

Learn what they know. There is a saying from somewhere that says *"Never underestimate the intelligence of your listeners, and never overestimate their need for information."* We might take for granted that most people involved in sales understand that trust is the basis of a sales relationship, but they may not actually understand the range of ways that trust can be built, or damaged.

You should also identify the level of knowledge that your participants have on a scale from awareness to mastery.



Learn their motivation. Are your participants interested in the training that you offer? Anyone who is motivated in what they know about the training before it is delivered can help to motivate their colleagues; people who lack interest, however, will be a little more difficult to engage. Are your participants:

- Prisoners?
- Vacationers?
- Socializers?
- Learners?

REVIEWING THE MATERIALS

Once you have your needs analysis complete and know what kind of training that you need to design, you can begin to gather materials that will help you reach your objectives.

Your materials are a very important component of training. Make sure that the materials you will rely on are current and applicable. There is no point in gathering material about sales techniques, for example, when the techniques listed in your resources have been well proven to be ineffective and are no longer used.

In addition, be careful with information that you glean from the Internet; while we can find virtually anything on the World Wide Web, sometimes what you are finding is information, but what you actually want is knowledge.

Copyright laws vary around the world, but they are uniformly strict. If you are using materials that someone else has written (whether they are published or not) or you plan to include copies of articles or other information, make sure that you have written permission from the copyright holder, and that you note their permission properly within your materials.

IDENTIFYING AND RESOLVING GAPS

Now that you know what your training objectives are and you have your materials gathered, take some time to formally evaluate where the gaps are in learning so that you can design a tailored training plan.

Ask yourself questions that pertain to the following domains.

Cognitive Domain

- As a result of this training, what is important that people know?
- What do participants need to know that they did not know before?

Affective Domain

- How do I want participants to feel about what they learn?
- Am I trying to create a positive attitude toward a changed process, excitement about a new idea, or self-confidence over their ability to perform?
- How do I want them to relate to people in ways they have not before?

Psychomotor Domain

- What do participants need to do that is different from what they did before?

Interpersonal Domain

- Are there behaviors that need to or will change as a result of the training?

To answer the questions, you will need to gather more information than you actually need. Thoroughly research your topic, analyze the material, and then distill it down to the essentials that you will use. Having too much information will mean that you do not run out of content during training, and that you have the resources available so that you can answer questions that people ask. Remember, sometimes our audience knows more than we expected, and material becomes redundant very quickly.

Here are a few research tips that will help you to determine trends that may be impacting the industry or organization, and will help you to locate your reference material:

- What articles have been published in trade or industry articles in the last 12-24 months?
- What articles have appeared in business or popular publications in the last 12 months?
- What topics are being blogged about repeatedly in the last 12 months? (Be careful about using the information, as we mentioned previously. Blogs can tell you what the hot button issues are, and provide you with information, but they could be thin on research or knowledge.)
- What books have been published on the subject in the last year?
- Which topics appear over and over again on conference programs for this industry?

You cannot teach a man anything. You can only help him discover it within himself.

Galileo Galilei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CHAPTER THREE

CREATING A LESSON PLAN

A lesson plan is an outline that can both keep you on track and give you plenty of options. While the lesson plan is a guide for how you will manage a particular workshop, a well-designed lesson plan will also allow you to really enhance your training.

PLANNING FOR THE BASICS

A lesson plan may remind you of being in school and having a teacher flip open a plan book. That really is what you are doing here. A good lesson plan won't just keep your training on track; it helps you to ensure that you have included all of the required elements in your training. In addition, a good plan has a few extra elements to it that will help keep you on track.

The Introduction: Sometimes a trainer is so focused on delivering the training that they forget that they also have to introduce themselves. Your introduction at the beginning of the session (whether you do it yourself or someone else introduces you) helps to establish your credibility as a trainer.

- Are you a subject matter expert, someone who has been where they are and has a good understanding of their needs?

- Is there something compelling about you to the participants that they need to know?

Wrap-Ups: If you can start your training by considering your wrap up, you will bring some enhancements that other trainers don't. For example, you'll want to end your training with a strong call to action so that participants make the intended changes to their behavior. Sometimes that means providing them with that call to action in an empty form at the beginning of training so that they can build it throughout the day. Other times, it means creating it as a part of the summary or evaluation. Whatever way you decide to wrap up the day, this is an essential element of your training plan.

Activities: Activities are designed as places and times where learning takes place. They are also a way to engage those different types of learners on levels they relate to, and allow for the self-directed learning that you are designing to take place. Don't just throw in an activity because you think it's time; plan things that are meaningful to your training. We'll cover different types of activities later on in this course.

Breaks: Planning breaks and meal times is as important as your training itself. Starting and ending training on time – including the times that you design for breaks – shows your participants that you value them. When it comes to breaks, you can also plan them strategically when you have exercises taking place. Designing exercises that will be finished as a break starts means that people who finish up early can leave the room and not distract the participants who want a few extra moments.

Lunches: Lunches are an interesting part of your training plan. If you can afford to have lunch provided with the training, it's a nice way to keep the group together and have them grow a little closer over meal time conversation. If participants must bring their own lunch, encourage them to share the time together, again for some connecting or networking. If you can avoid having your participants wander too far at lunch (for example, by shopping or sightseeing if they are from out of town) then you can avoid their commitment to the class leaving with them, and they will return on time.

ADDING SLACK TIME

There are a several different ways that you can build some flexible time into your training. Having participants help to design the training (perhaps by selecting which objectives you will cover in the training), is one great way to do this.

Secondly, keep in mind that training is all about your participants. As trainers, sometimes we are so excited about the potential for growth that we cram way too much into the lesson design. Keep your materials content rich so that you have excellent training, but don't feel that you have to incorporate everything that you know just because you can. Meet your objectives, be participant-centered, and design your lessons well.

The best way to build in some flexible time is to deliberately create a couple of spaces in your day that are light so that if you do need to incorporate something extra, or people get engaged in a particular learning opportunity, you won't have to race to get through the rest of your material. This means that you have a couple of topics that are optional that will add to the training if you can include them, but can be left out if needed.

CREATING A PLAN B

A back up plan is an important contingency in your training plan so that you can avoid disasters or at least minimize their effects and maintain your professional decorum.

We've probably all heard about speakers who put on their lapel microphone and then forget to turn them off while going to the washroom. One trainer we know was ready to provide a ninety minute breakout session at a conference. She had checked the room out ahead of time, tested her laptop and slides to make sure they worked, and checked that the lighting was okay. She even spoke with the audio-visual technician and tested out the microphone.

Everything seemed fine, until the session started and she spoke! Someone from the next room (which had been empty when she did her testing) stuck their head in the door and explained that she could be heard in all the rooms on that side of the hall. She had to take off the microphone and project her voice in order to be heard by 200 people.

Here is another example: a car with four participants starts out on a two hour journey to attend training, and a tire blows out. By the time the tow truck arrives and the tire is fixed, that car load of trainees is now two hours late for your session, which you started on time.

Is your program flexible enough to allow you to have groups working simultaneously yet be in different places in the program? Can you help those four trainees get caught up at lunch time? How will you handle these kinds of unforeseen adventures that can test your mettle as a trainer?

*I never teach my pupils;
I only attempt to provide
the conditions in which
they can learn.*

Albert Einstein

CHAPTER FOUR

CHOOSING ACTIVITIES

For many people, it is by *doing* that understanding comes. People come to training expecting to learn, and one of the best ways that you can help them to do that is to develop activities that support the learning objectives and allow for some kind of engaging action and development.

TYPES OF ACTIVITIES

Trainees expect that training will be stimulating, interesting, and yes, fun. That does not mean that you have to be a comedian (unless you are, of course, and are hosting a stand up comic's training workshop), but it does obligate you to incorporate some activities into your training that helps to engage your learners.

Planned activities will bring the following elements to your training:

- Keeps the day moving at a stimulating pace
- Fun helps to bring people together and break down barriers
- Laughter leads to an endorphin release, which is healthy
- Improves retention of material by providing hands on application and practice

In order to fully involve your trainees, make sure that you preface activities with a discussion about safety. Let them know that what takes place in training stays in training, so that they are encouraged to take risks, challenge previously held assumptions, and make mistakes and learn from them.

Choosing the right activity is very important. One sign of a good trainer is someone who knows how to choose and even modify an activity to fit certain situations. A good resource library of activities is important so that you don't find yourself re-using the same activities and tiring of them, or exposing them to people over and over, especially if you are an in-house trainer developing workshops for the same people.

The following list is a handy reference of the types of activities that can be the right fit for your training. Although some of the headings may overlap, the definitions are here to give you a better understanding of the range of activities that can be used.

Game: A game is an exercise that normally has a set of rules and an element of competition. Games often include some kind of reward.

Icebreakers: Icebreakers are used as an exercise to introduce group members to one another (break the ice), encourage some energy into the beginning of a workshop, and lead into the topic material. They are an important starting point to your training session.

Energizer: An energizer is a brief pick-me-up activity designed to invigorate a group if energy in the room is waning, or to bring them back together following a break. Energizers are often about five minutes long.

Simulations: A simulation is useful to train equipment operators when the tools that they will use are either very expensive or dangerous. Simulations are designed to be as realistic as possible so that participants can learn from the situation without worrying about damage or financial cost. Flying aircraft, offshore emergency evacuation procedures, combat training, and driving all make use of simulation training.

Role Plays: Role-playing is a helpful way to understand how participants react to certain situations. They are a very useful approach for practicing new skills in a non-threatening environment, where a participant learns to apply behavioral techniques and gets feedback without fear of making a mistake in front of their own customers or clients. Role-plays are helpful in learning conflict management, counseling, sales, negotiating, and many other skills.

Case Studies: Case studies are stories normally extracted from a participant's workplace or industry. They can also be written specifically to simulate a scenario. Case studies are often examined by individuals or groups and then analyzed to stimulate discussion or demonstrate aspects of training.

PREPARING FOR EMERGENCIES

When we think of emergencies, we often think about fire alarms going off, or someone getting ill, and are prepared for those things by knowing where emergency exits are, who to call, or how to respond. This section is for training emergencies, and how to prepare, avoid, and manage them.

You've developed a brilliant course, all of your materials are ready, and the day is unfolding nicely when all of a sudden, things begin to go horribly wrong.

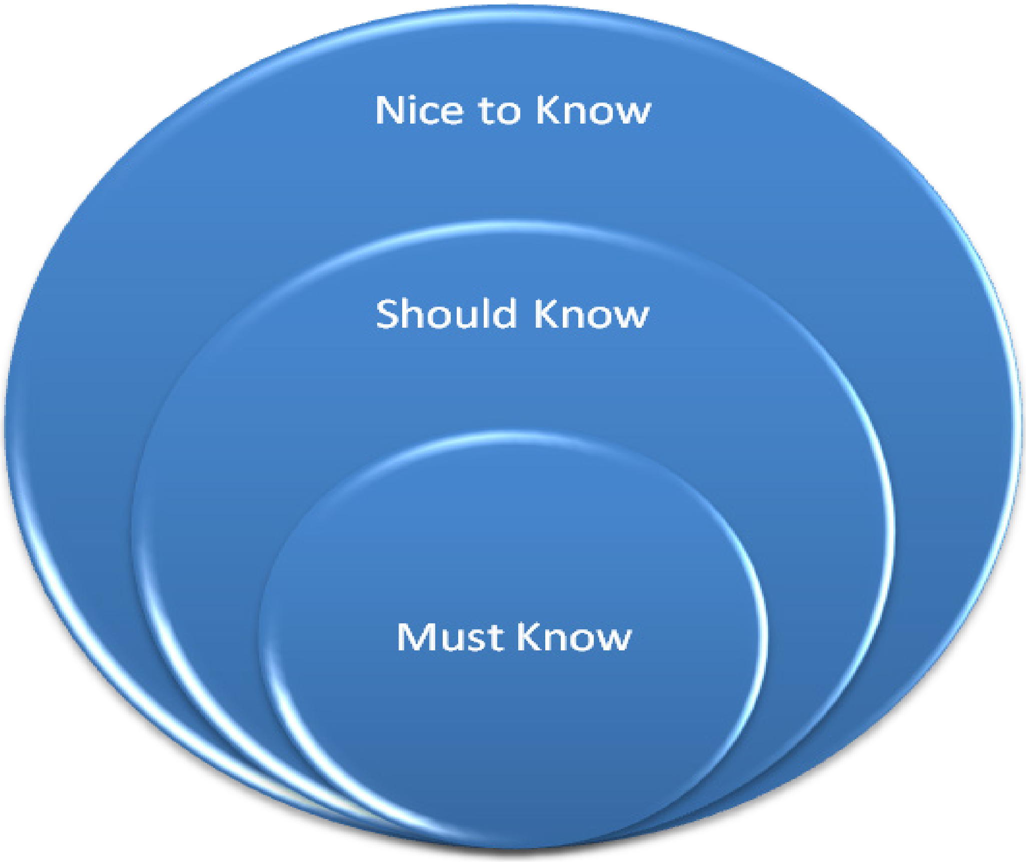
What are you to do next?

First of all, don't panic. Remaining calm in the face of an error or near disaster is important, because your participants will pick up on your emotions and get edgy just as fast as you do. If something is really wrong and you need help, make eye contact with a participant who has been particularly helpful, and ask for their assistance.

If you are faced with an emergency (for example, you as the trainer develop a horrible case of hives and must leave to take a dose of antihistamine and call a doctor), then having some activities on standby will help.

A more likely scenario is running out of material if you have a group that is grasping their training very quickly. Preparing a stand-by pile of activities that reinforces the training objectives is ideal for this situation.

When you develop training based on a model like the one below, most activities are designed to reinforce what your participants *must* learn first, followed by extensions for what they *could* learn, or that would be *nice to know*.



These extension activities are also very useful when you have a training group that learns at very different speeds, so that you can offer the fast finishers some kind of reinforcement or enhancement to take that learning to a higher level or simply offer more exposure to the content.

Emergency activities do not have to be complicated. When you prepare your training, bring along some of the information (textbooks, policy, procedures, pertinent articles, photos, etc.) that you used to develop your course and allow participants to flip through the material. Ask them to provide you with feedback on what they read, create discussion questions, write a case study, or to incorporate the enhancements into their action plans for the end of the day.

WHAT TO DO WHEN ACTIVITIES GO WRONG

Even if we create excellent courses and training plans, as trainers we also recognize that a game or activity that worked with one group may not work with another. In order to be comfortable that you have selected the best activities, consider the following:

- Avoid activities that would annoy you if you were a participant.
- Adjust the length and type of activity to suit the length of the training session. A one-day workshop may or may not benefit from a 45 minute icebreaker at the beginning; a five or ten minute icebreaker is probably just fine. However, if your group is taking part in a three to five day workshop and the outcomes improve when participants get to know one another really well, then an extensive game of up to an hour is appropriate.
- Know your audience. Senior staff does not usually want to look silly or foolish in front of their subordinates. Junior staff may not be comfortable looking silly in front of their boss.
- If participants arrive in business clothes, they may not be comfortable with really active games. If your session will be highly active or calls for casual clothes, make sure that participants know that ahead of time.
- Participants who work together may know each other very well will find some exercises redundant. Be selective about the activities that you choose.
- Learning that dealing with personal development subjects such as communication or team building will benefit from games more so than training that is related to computer software, for example. The

software group, however, might really need one or even several short energizers throughout the day to maintain motivation levels as well as retention.

If an activity flops: If an activity does not go over well with your group, don't push it through to the end just because it's a part of your lesson plan. Sometimes the dynamics of a group do not support an activity.

Here are some things that you can do if an activity flops.

- Stop the activity and refocus the group. You can let them know that something went wrong, and that you are going to try again or you can abandon it altogether and move on.
- Watch the energy levels. It is not unusual to expect that if an activity fizzles, the energy in the group will decrease sharply. People may feel that they have done something wrong. An energizer will get everyone reinvested in what is going on and restore those energy levels.
- Organize an on-the-spot debriefing session and have the trainees identify what went wrong, and how to remedy the problem or move beyond it. Do not focus on why things went wrong, since that can lead to blaming or negativity that shouldn't be introduced to the session. Focus the conversation on what and how.
- If the activity was applicable to the learning objectives and would work with some modifications, then make some changes and use it again. If it really isn't applicable, then let it go and develop something that will enhance the training session the next time that it is offered.

I have never let my schooling interfere with my education.

Mark Twain

CHAPTER FIVE

PREPARING FOR THE WORKSHOP

Being ready is the sign of a competent trainer. Not being prepared can derail your training before it's even started. Follow the tips and techniques in this chapter to help you deliver effective and memorable training.

CREATING A MATERIALS LIST

When it comes to materials, being over prepared is a good idea. As you design your lessons (and if you have used the template for lesson plans that we provided earlier), you will also be creating a running materials list that you need to bring to training. Double check the list and your supplies to make sure that you do not run out of a particular item, and that everything works as it should. There are few things more embarrassing for a trainer than to start training and realize that the key parts of an activity have been left at home, that the felt pens are all dried out, or the bulb in the projector needs replacing.

What to do if you have forgotten something: Take it all in stride! Murphy's Law says, *"What can go wrong, will go wrong,"* and if you've ever had a day that went from bad to worse, you know that it can happen. You forget your handouts, or the bulb in the projector goes, or the laptop that has been provided won't read your memory stick or disk. What to do?

Have a backup plan! The longer that you train, the more likely you can come up with a related activity on short notice that will cover any serious problems, such as allowing for an IT technician to get your equipment up and running. This is where having extra material comes in handy.

As trainers, we can exercise some caution when it comes to electronics and training. If your entire presentation relies on an electronic slide presentation (such as PowerPoint) and projector, then you will want to get in the habit of carrying an extra bulb with you at all times. It is also where your professionalism and ability to go with the flow are important; don't let the absence of a video clip or a crashing computer derail the day.

GATHERING PARTICIPANT INFORMATION

The more effort you can put into getting to know your potential training group, the more effectively you can design training that meets their needs. Use this space to list some different approaches to getting to know your audience.

During training, or at the end with the evaluation form, you can also gather information. Make sure that information that you gather is protected in keeping with the appropriate privacy legislation. In addition, if you wish to send follow up information (whether via e-mail or post), you can ask participants for their contact information and their permission to contact them. Gathering this information is helpful for several reasons: it can allow you to send follow up or additional information to the trainees (which will further reinforce your training), and you can also let people know when additional training that might interest them is available.

As a professional practice, you should never, EVER sell, lend, release, or otherwise compromise the lists of names and contact information that you gather as a part of your professional training.

If you are trying to gather information about participants during training; perhaps to get a concrete idea of how much they know about a subject, you can design a pre-test. At the beginning of training (or even a few days before), participants complete the pre-test to get a benchmark of where they stand in terms of the training objectives. At the end of the day, they repeat the same or a very similar test, and then will have a concrete demonstration of how much they have learned.

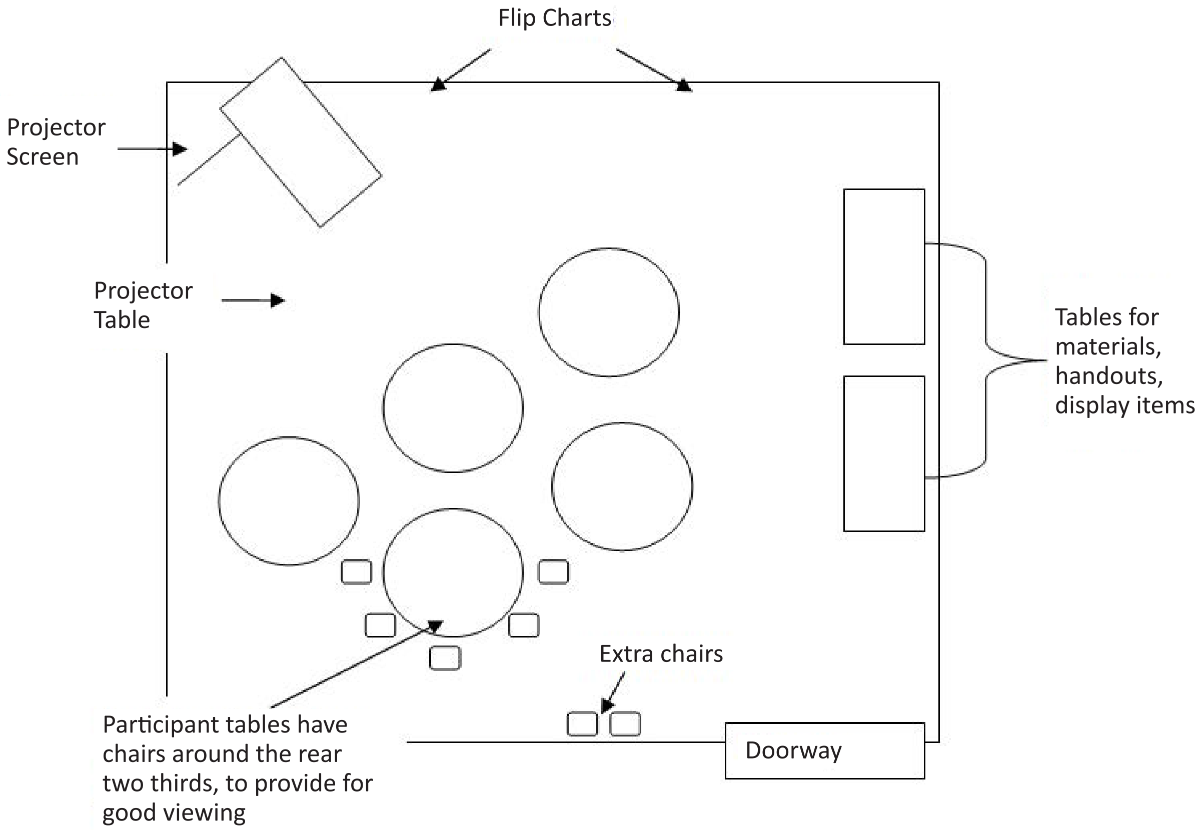
SETTING UP THE PHYSICAL LOCATION

An ideal classroom set up includes the following items:

- A room with minimum 10 foot ceilings and no pillars.
- Participants enter from the rear of the room (to allow for the least amount of disruption).
- Tables are set up with a few less chairs than required, with extra chairs stacked in the back of the room. This ensures that people will fill the available tables and chairs, rather than having lots of tables available and people spread thinly throughout the room.

- To encourage discussion, tables need to be round, with people sitting around 2/3 of the table, and with the front 1/3 of the table empty, so that everyone can see the front of the room. Five to seven people per table is ideal for discussion purposes.
- Flip charts are only used for groups of less than 20. If you have more people than that, you should be writing on an overhead projector, large electronic whiteboard, or tablet projected onto a screen so that everyone can see.
- If you are using a projector (i.e. for PowerPoint slides), make sure you know how to adjust the keystone setting so that the image is square on the screen. (The instruction book for your projector will explain how to do this). Any projection screen should be 40" or 44" or so off the floor at the bottom, so that everyone can see (hence the 10' ceilings).
- If you are using PowerPoint slides, make sure you are in slideshow mode, rather than application mode. This ensures that the slides take up maximum space and that toolbars and menus are hidden.
- Have a few tables against the walls of the room so that participants can flip through or gather materials as needed. One table at the front is helpful for the trainer to have access to their materials and to display items.
- Sometimes we are providing training in a room that is "set" and difficult to rearrange (i.e. in a university or a boardroom). Do the best you can with what you have, but enjoy the opportunities for ideal arrangements whenever you get them!

A diagram is shown below:



Creative thinking
may mean simply the
realization that there's no
particular virtue in doing
things the way they have
always been done.

RUDOLPH FLESCH

CHAPTER SIX

GETTING OFF ON THE RIGHT FOOT

Get the session started right by being ready to welcome people as they arrive. They are just as curious about you as you are about them. They also will warm up to you if you are ready and welcoming each one as they arrive.

GREETING PARTICIPANTS

Greetings are an important part of getting your training off on the right foot. When you think about greeting your participants, put yourself in their shoes and think of the things that appeal to you when you attend training somewhere.

Some key elements typically include:

- The instructor greeting participants as they come in the door, with an invitation to come in (and sometimes, sign in)
- Request from the instructor for participants to make themselves a name tag or tent card
- Trainees introducing themselves individually, or for large groups, introduced at their tables)
- Some type of icebreaker takes place

- Trainer is introduced
- The trainer and the room are prepared, ready, and welcoming
- Agenda is reviewed
- Participants are asked about their expectations and learning objectives

BEING PREPARED

In order to be ready to welcome participants to your training, you must be prepared. Try to get a good night's sleep before hand, and leave yourself plenty of time so that you arrive at the training site early.

If your presentation is technology heavy, arrive 45-60 minutes before your class starts in order to set up, test, and work out any problems before your participants arrive. If you are walking into training where the technology is already set up, or you are not using a laptop/presentation style approach, arrive 30 minutes early.

Other things you will want to do:

- Set up your materials
- Make sure the room is prepared properly
- Locate the washrooms
- Locate emergency exits

If your training runs for more than one day and everything is in working order, you can arrive 15 minutes early for day two onward, but be sure to calculate traffic and other factors (such as weather) properly. It is important that you arrive before your participants do, and that you are ready and able to welcome them.

Your welcome should include the following:

- Make sure that the room is welcoming and ready before participants arrive
- Greet participants individually as they arrive and invite them into the training room
- Ask them to sign in and make themselves a name tag or tent card if you are using them
- Invite them to help themselves to a refreshment if they are available
- As you get things underway, introduce yourself (or have another trainer/host introduce you) to break the ice and establish your credibility
- Have the trainees introduce themselves
- Review the agenda for the day so that people know what to expect
- Asked participants about their expectations and personal learning objectives

When you ask participants about their expectations, be prepared for them to have thought of things that you may not have, but don't worry. If there are things that people were looking for that you can incorporate in some way, then it is recommended that you do so. If you are not able to incorporate them, assure the participants that you can provide them with information that they need, and be sure to follow up.

USING ICEBREAKERS AND ENERGIZERS

Icebreakers are an opener into training, and can serve multiple purposes.

Openers help to prepare people for training. When we start a workshop, as a trainer we are fully ready for the program that has been prepared. Our participants, however, can come from all kinds of places; they may be thinking about a project at work, worried about something at home, checking their PDA's for messages, or distracted by a myriad of things. In order for our training to be effective, we have to break through participants' barriers and tap into their motivation. Openers are important because they set the tone for learning, gain attention, and break pre-occupations.

Many openers serve more than one purpose, and the work of the trainer involves selecting the activity that will best meet the needs of the group. For example, if you are training a group of people who know each other very well and work together every day, an introductory or networking icebreaker may not be very interesting for them. Focusing on team building, however, by having them complete a task together, could really help them through the training. People that do not know one another well can really benefit from getting to know you or networking activities.

The other important role of the icebreaker relates to tension. If there is tension in the room or amongst participants, that tension can interfere with retention. There are different types of tension that you can be aware of, and plan to reduce, with the training that you design.

- Task tension can build when a learner is working on a completely new task or learning experience. Learning new software, rules, or policies can all contribute to task tension.
- Relationship tension can occur when a learner has been embarrassed previously in a classroom, or is afraid of being singled out.
- Personal tension can occur when a learner is concerned about work building up while they are in training, waiting for a phone call about something significant, or distracted by a personal matter.

The right opening activity will assure learners that they are in a safe place where their learning needs will be met, and that they are respected contributors to the learning process.

Energizers are exactly that. They are a short (often 5-10 minute) activity that also can serve more than one purpose. An energizer can:

- Reconnect a group (for example, bring people back together after a coffee or lunch break)
- Inject some energy into the group if you notice that people are getting tired or not concentrating
- Break tension or provide some fun or humor

There are resources with pre-written icebreakers and energizers in the activities folder. These are useful guides, and you can often modify the activities to suit your training needs.

The art of teaching is the art of assisting discovery.

MARK VAN DOREN

CHAPTER SEVEN

DELIVERY TIPS AND TRICKS

In instructor-led, participant-centered learning, we are always looking for ways that participants can be successful through a period of self-discovery. This does not mean that we never lecture; sometimes, short lectures are the most effective way to deliver new content. What it does mean is that lecture is the last choice, after we have considered a variety or alternative methods.

USING VISUAL AIDS

We form pictures in our mind as people speak to us, and we can think much faster than we speak. Therefore, if someone speaks to me at an average rate of speed (150-175 words per minute), and I am thinking at 400-500 words per minute, the right visual information will help me to form an accurate perception in my mind.

Earlier we mentioned that flip charts should be only used for groups smaller than 20. We also mentioned that PowerPoint slides must be keystoned and displayed properly in order to be effective.

We have some additional key considerations when using videos as a visual aid:

- Videos can be very helpful at showing motion, which is important, for example, at showing how machinery works. Video can also capture strong illustrations. One example is a contrast of what to do and what not to do for people working in customer service.
- If you are using a video clip, choose it carefully; make sure that you have it cued to start at the right place so that you are not wasting time trying to get it set up during training.
- Preview the video clip.
- Make sure that you have the appropriate copyright permission.

As you consider the video, ask yourself the following questions:

- Will your participants see this as relevant?
- Is the video directly applicable?
- Do you have to create supporting information (listening guides, activities) to go with the video?

A video is not used as a "change of pace" or "different media." It must apply directly to the training.

CREATING SUPPORTING MATERIALS

Whiteboards: Having replaced old-fashioned chalk boards almost exclusively, whiteboards can be a useful tool in training. Markers come in a wide variety of saturated colors, which are very effective and can be seen throughout a small to medium sized training room.

If you are not familiar with writing on a whiteboard, make sure that you get some practice. The surface of a whiteboard is quite different than chalkboards or flip charts, and it can take a few tries before you are able to write in reasonably legible letters, on a fairly straight line.

Whiteboards are often magnetized. If your training includes concepts that build one upon the other or relate to one another, you can print the concepts on very large cards and attach them to magnetic strips. That way you can move them easily on the magnetic board and demonstrate how things relate to one another, work on sequencing items, or on developing new processes.

Flip Charts: Flip charts are a great tool, but often misunderstood. The idea of a flip chart is that you have a visual tool that you can create on the go during training, or ahead of time for short lists. The flip chart is suitable for groups of fewer than 20. People at the back of the room will have difficulty reading off a flip chart.

To effectively use a flip chart:

- Prepare some sheets in advance if possible and keep them covered with a few blank sheets until you need them. You can also cover points with blank strips of paper that you tape on, and then remove carefully through your presentation.

- Use highly saturated color, but don't feel like you have to stick to black, blue, and red. You can now get felt markers in dark green, purple, bright pink, orange, and many other colors. As long as the color is saturated (very dark), people should be able to read them. Avoid yellows, pastels, or washed-out colors.
- Leave some empty space at the bottom of the page so that you can add things later, or, if you are sticking the pages to a wall for people to refer to, so that participants across the room can still read what is at the bottom.
- Make your flip chart pages look interesting. Underline, circle, or put stars around key concepts using a variety of color and shapes.

Delivery Tips: When you are using a whiteboard, flip chart, or slides, here are some tips for engaging your learners.

- Don't stand with your back to the group and read off the chart. Stand to one side, facing trainees, and refer to the information. If you stand in front of the chart, they cannot see what is on it, and if you are not facing them, they may not hear what you have to say.
- Touch the information as you refer to it, or use a moveable device to point it out.
- Tear off the flip chart when you finish the page. Then, hang it on the wall to demonstrate its value and as an ongoing visual reminder of what has been discussed. Don't just flip it over the back where it moves off of people's minds.

Using PowerPoint Effectively: It can be tempting to turn everything that you are saying into an electronic slide. The most common version of slides used in training at present is PowerPoint, but there are other similar programs.

When you create slides, remember that they are simply a visual aid, and a tool. Don't feel that you need to capture every word you say, or want the trainees to learn, on a slide. Some of the most powerful slides you can create will have no or very little text on them, but could be enhanced with photos and other graphics related to the training.

Tips for Supporting Materials: Whatever visual aid you are considering, here are some questions to help you determine its effectiveness.

- Space: Is the visual clear and obvious about what you are communicating? Does it make good use of space?
- Sight: Can people see the information clearly? Are the colors dark enough, and print size large enough, that no one is squinting?
- Singular: Does the visual represent a single, important idea? If not, you may confuse your trainees by squeezing too much into one visual.
- Significant: Does it focus trainees' attention on the point you are trying to make?
- Simple: Desktop publishing and access to different fonts can be lots of fun, but if you have too many typefaces, images, or graphics on one visual, people can miss the point. Keep things simple. One good guideline is that there should be no more than two different fonts on a slide, and no more than one idea.

BREAK!

With a little practice, you will be able to gauge when your group needs a break from training. If you have set up an agenda that includes breaks, people will expect you to release them on time, so be sure to stick to what you have said. With some experience, you can read other times that people may start to fade.

If people are getting sleepy (a significant danger in the post lunch period when serotonin levels naturally fall and people are sometimes tempted to nap), introduce a quick stretch break or short energizer. Another technique is to ensure that there is plenty of cold water available in the room so that people feel well hydrated.

As adults, we sometimes expect that our participants will make it back from breaks on time and with enthusiasm. That's not the case, however, and so some pre-planning from you will help get people back on time so that training is not disrupted. Some methods to keep in mind:

- Music
- Question and answer or trivia game
- Have a volunteer bring people back in
- Blink the lights off and on
- Offer a great tip or two just as the break ends
- Synchronize watches at the first break and then use odd times to bring them back (like 9:15)

The real voyage of discovery consists not only in seeking new lands, but in seeing with new eyes.

Marcel Proust

CHAPTER EIGHT

KEEPING IT INTERACTIVE

Participant-centered training is led by a trainer, but sometimes you may almost wonder why you are there because things are going so well! This is a sign of excellent program design, and that participants are taking responsibility for their learning. Give yourself credit for setting up an excellent workshop, since the learning that is going on actually wouldn't be taking place without you.

This chapter will give you some ways to create one of those energetic, interactive workshops.

ENCOURAGING DISCUSSION

In order to engage participants through discussion, it is helpful for you to keep the terms "instructor led, participant directed" in mind. Putting some parameters to the discussion helps participants stay on track and meet the objectives. If you just have them "discuss" a topic, it can be easy for one or two people to take over the conversation, or for someone to take off on a tangent.

Some good ways to help participants stay on track include:

- Provide participants with the objectives of the discussion (example: identify three to five ways that discussion is helpful in training) or a set of statements or questions that will guide them.
- Organize in groups in different ways so that trainees interact with a variety of people whom they can get to know through discussion.
- When asking questions to a large group, the trainer should ask a question to the entire group, and then select the person who will answer it. (Sometimes we select the person first and then ask the question, but there is a good chance the rest of the group will tune out once they know they do not have to provide an answer.)
- Provide people with processing and thinking time. Some people want to answer right away, and others prefer to think about an answer before expressing it. One way to do this is to give participants time to write notes or answer questions on paper before they start to discuss the topic. This gives people who like time to reflect more of an opportunity to enter a discussion.
- Respect everyone's answers and thank them for them. This will encourage people to enter the discussion.

USING GROUP WORK

In order to make group activities work for you as a trainer, here are some tips:

- Provide the group with clear directions, points to discuss, or case studies to keep their work focused
- Make sure that you have all the needed materials for group work to start on time and be most effective
- Circulate around the room, keeping groups on track and offering assistance or refocusing when needed

Complete the following chart to help you understand the pros and cons of group activities.

Likes	Dislikes

THE POWER OF STICKY NOTES

Sticky notes don't just add color to your presentation; they can also add value as a visual aid. A few ideas for using sticky notes in a presentation:

- Write just one idea per note.
- Write only one or two words per note.
- If you are using sticky notes at the front of a room, make sure you use saturated color markers and write in the same size letters you use on your flip chart or whiteboard.
- Place smaller sticky notes on participant tables so that they can use them to highlight memorable information throughout your workshop or use them as a bookmark.

It's always helpful to learn from your mistakes because then your mistakes are worthwhile.

GARRY MARSHALL

CHAPTER NINE

DEALING WITH DIFFICULT PARTICIPANTS

Training involves people who, as we have already discovered, come to class with different reasons and motivations. Prepare for behaviors that can derail your training plan, so that you can continue to deliver effective training. Understand, too, that these difficult behaviors can come from a variety of learner types and people. Practically anyone can have an off day and be considered difficult, even us trainers! Frustration, boredom, or personality characteristics can stretch you beyond the scope of training that you deliver.

THE GROUND RULES

Rules will help you as a trainer so that you can establish a learning environment. The rules can be generated by your participants, which is especially helpful during workshops that are about teambuilding or trust. In the interest of time, the rules can also be simply stated by the trainer. Often, the rules that are suggested by your participants will relate to respect for one another, and this is always worth pointing out to the group. Try and keep the list of rules short so that people will remember what they are.

The three key rules are:

- Respect. Arriving on time, avoiding sidebar conversation, turning cell phones off, and not being the center of attention, are all items that relate to respect.
- Encouraging participation and fun. This includes enjoying the day, not picking on others, and freedom to explore and try out new ideas without feeling judged or bullied.
- What takes place in the workshop stays in the workshop. This is so that comments about the workplace or a particular person, or how funny someone might have been in the workshop, are not spread through the workplace as gossip following the session. This will help participants take risks during the training. (This rule is often very helpful for the trainer, in terms of rapport, participation, and respect. However, if the employer, who is paying for training expects the trainer to report back to them what learning has taken place and so on, be sure that the trainees are aware of this. Depending on the nature of the training, you may be able to still maintain a "staying in the workshop" approach and report just the training outcomes to the employer.)

Rules can have a fun aspect to them if you word them with a little creativity. For example, rule number three can be re-worded with the well-known phrase *"what happens in Vegas stays in Vegas."*

CHALLENGES AND SOLUTIONS

When you think of how you are within a training session – like this workshop, for example – do you ever exhibit any untoward behaviors? Although we like to think that we probably do not exhibit poor trainee behaviors, many of us can on a given day. What are you like if you do not get enough sleep, consume a lot of caffeine, or are distracted by things that are taking place while you are away from work and at training?

Undesired Behavior	What it Does	Solutions
Joker	This person can help reduce inhibitions and make people laugh. They may not recognize that their continued interruptions can monopolize your session.	Restrict the number of times they intervene. Take them aside during a break and say, "I appreciate your humor, but our time here is limited and it is my job to make sure that everyone has a chance to contribute as we move through the material."

Cynic	A negative person who may have seen previous efforts end in failure. They may also have had trouble having their own ideas listened to in the past, or could feel poorly equipped to succeed.	Explain benefits to making changes and work on gaining commitment. Listen to and acknowledge their issues so that they are addressed through training. Provide them with one opportunity to explain the reason for their doubt, ask them for a solution, and then indicate that you are moving on.
Indifferent	An indifferent person does not participate in discussions fully. Like the cynic, their feelings of indifference can come from having tried and failed, or having ideas ignored.	Try to uncover the cause and find ways to involve the individual fully, while respecting and encouraging their involvement.

Cynic	A negative person who may have seen previous efforts end in failure. They may also have had trouble having their own ideas listened to in the past, or could feel poorly equipped to succeed.	Explain benefits to making changes and work on gaining commitment. Listen to and acknowledge their issues so that they are addressed through training. Provide them with one opportunity to explain the reason for their doubt, ask them for a solution, and then indicate that you are moving on.
Indifferent	An indifferent person does not participate in discussions fully. Like the cynic, their feelings of indifference can come from having tried and failed, or having ideas ignored.	Try to uncover the cause and find ways to involve the individual fully, while respecting and encouraging their involvement.

Talker	Disrupts by continually interjecting with comments or anecdotes. In severe examples, the talker can be monopolizing and distracting for the trainer and participants alike.	Use proximity to stand close to them and silence them politely when they take a breath. You might use a sentence like, "I appreciate your comment, but we need to move on; perhaps you can tell the full story at the break," and then move on. Directing their energy to keep them focused and on track. At a break explain that you respect and appreciate their experience and input but must ensure that the group all participates equally. Ask for their support.

Whisperer	Disrupts by starting side conversations that may or may not be related to the training.	Check for understanding by asking if they misunderstood or are having difficulty hearing you. If they are, then you may need to adjust your approach to the training. If they are starting unrelated chatter, politely ask them to hold off until the break. Insert an energizer or activity that requires the participants to rearrange seating so that the whisperers are no longer seated together. Stop talking until they notice that they are distracting the group.

HANDLING INTERRUPTIONS

Most often, your training is going to look easy to participants. That is part of doing a great job. Sometimes, though, things can happen that will set your training schedule sideways. In order to be prepared for interruptions, you and your group will develop some sure fire strategies to manage them effectively.

The next time that something goes awry, what will you do?

Type of Interruption	Action Plan
Power Outage	Identify in advance if there is emergency lighting in the training facility Have some flashlights handy Make sure people don't panic Have some quiet activities ready (i.e., Telephone, one-word story)

No matter how thoroughly a person learned the Greek alphabet, he will never be in a condition to repeat it backwards without further training.

Hermann Ebbinghaus

CHAPTER TEN

TACKLING TOUGH TOPICS

Some elements of training are difficult, but you'll get through them because you are a professional. You may be asked to facilitate a subject that is very sensitive, or could find yourself part way through a presentation and learn that you have struck a nerve and will need to adjust your material.

TOUGH STUFF TO WATCH OUT FOR

Imagine that you have just been asked to provide health and safety training for your organization. You have never given this kind of training before, and in reality know little about it. However, there was a serious injury at the workplace two weeks ago that left one worker dead and another seriously injured. The difficulty is not just that someone died on the worksite, but also that you, as the in-house trainer, know all of these people very well.

What can you do to identify these difficult situations before training and be prepared for them?

ADJUSTING YOUR MATERIAL FOR A SENSITIVE ISSUE

Sometimes the unexpected can arise in an otherwise harmless training sessions. As we mentioned in an earlier chapter, people can often be pre-occupied with unfinished tasks at work, family pressures, and many other things. If you are treading close to emotional issues, it is possible that you will strike a nerve with someone. In addition, sometimes we are addressing sensitive issues in training that people may react emotionally to.

The greatest tools for you in adjusting your materials come to light before your actual training takes place. If you have been able to do some pre-training survey work, or even just interviewed a supervisor, then you will uncover the issues before entering the training room, and be able to prepare yourself for what will follow.

If you do not have the luxury of pre-training interviews, then your flexibility at managing a classroom, dealing with change, offering support, and creating a safe learning environment will all contribute to the success of this training endeavor.

DEALING WITH SENSITIVE ISSUES IN THE WORKSHOP

One way to deal with sensitive issues is to provide an attitude survey before a tough topic is discussed. This allows participants to put their thoughts and reactions on paper, and provides them with some thinking and adjusting time before the topic is discussed aloud among the group, or before other activities get underway.

Here are some tips for using an attitude survey in your training:

- It does not have to be called an attitude survey. Title it as something that makes sense and fits with your training plan. The term "attitude survey" is here for you to see, but might seem intimidating for participants depending on the subject.
- Participants may not want to reveal their answers to one another. Watch closely to ensure that people are not intruding on one another by forcing someone to reveal their thoughts.
- The attitude survey can be a good pre- and post-training activity. Participants can use the tool to monitor their own thinking or shift in perception throughout the training process.

  It may seem straightforward to offer an attitude survey, but you need to watch your language. Make sure that statements are not open to interpretation or bias, by using clear and simple language. It also helps in our program design stage to have a colleague review the questions or statements with you so that you can prepare an effective survey.

Really great people
make you feel that you,
too, can become great.

Mark Twain

CLOSING THOUGHTS

- **Aristotle:** Excellence is an art won by training and habituation. We do not act rightly because we have virtue or excellence, but we rather have those because we have acted rightly. We are what we repeatedly do. Excellence, then, is not an act but a habit.
- **B.B. King:** The beautiful thing about learning is that no one can take it away from you.
- **Thomas J. Watson:** Recently I was asked if I was going to fire an employee who made a mistake that cost $600,000. No, I replied, I just spent $600,000 training him.

Rick Chisholm made history when he single-handedly changed the professional Audio Visual industry by breaking all the rules and capitalised over 50% market share in Australia with very little capital, no partners, mergers or lenders and set up the first franchise operation of its kind in the world in the late 1990's and early 2000's.

As a 7x founder of companies and 30x businesses such as Innovest, AI Machine, Lightsounds, LSW, Light Emotion with revenue in excess of $300 million and having employed more than 1,000 staff over the last 35 years. Rick is known as the Start-Up and SME Guru and is Author of a number of books including Business Success for Life. Unlike many mentors, he actually walks the talk and has a number of businesses under management in such areas as Automation, Events management, Importing, Distribution, Retailing and E-commerce.

His BIG passion is Business Education empowering Businesses Owners through knowledge and skills. Whilst Rick has experienced great success, he has also endured many failures. Rick has faced and overcome the exact same challenges you are facing now.

Tala Chisholm is an SME specialist who has owned and managed several small to medium sized businesses in the last 20 years, several of which were eventually sold. She has extensive experience in the fields of retail, franchising, licensing, dealerships, education, importing, distribution and consulting.

Her expertise lies in building and implementing customised cross-platform database and software solutions for businesses, automation, IT, web marketing, advertising, graphic design, business administration, process refinement and implementation. Her business experience ranges from bricks-and-mortar Giftware retailing to highly technical fields such as Security, CCTV, Entertainment Lighting and Audio sales, hire and installations as well as e-commerce.

Throughout her career she also trained and mentored Franchise business owners as well as internal division managers. Some areas of training included retail operations, management practices, business strategy, accounting, cash-flow, marketing, customer service and IT. She has also headed up the drafting of Operating Compliance Manuals for Franchise operations and implementation of all the elements involved.

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