



**INNOVEST SME**  
Accelerating Small Business



# Lunch and Learn *as a* Training Strategy

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# PREFACE

The working lunch can develop a negative reputation among employees. It often involves being in a roomful of other people with low blood sugar, trying to stay awake while someone drones on about policies, procedures, etc. Lunch and learns, however, should be engaging and enjoyable. Hosting a lunch and learn correctly will improve employee satisfaction and the quality of employee training.

*A man may be a  
pessimistic determinist  
before lunch and an  
optimistic believer in the  
will's freedom after it.*

ALDOUS HUXLEY



# THE PREP WORK

Prep work is necessary to the success of every endeavor. The success of lunch and learns depends heavily on the prep work. It is important to plan out the details of the gatherings. Planning requires more than a time and a date. You must find the right location, and set everything up ahead of time. This will prevent surprises and ensure that everything runs smoothly.

## FINDING THE BEST LOCATION

The most important prep work necessary for lunch and learn is finding the best location. This will be determined by the needs of the lunch and learn program you are facilitating. You must find a location that holds all of your participants when eating and provides enough room for any training exercises you need. A location that is too small will feel cramped and uncomfortable, and a location that is too large will allow people to isolate themselves. You have a number of different venues to choose from when finding a location, whether you choose to host it onsite or offsite.

### **Venues:**

- Meeting rooms
- Restaurants
- Hotel conference rooms
- Public venues

## SETTING UP THE LOCATION

Do not overlook setting up the location. Again, the learning itself will determine what you need to set up ahead of time. Ask yourself a few questions to determine what you need to set up.

### Setting up:

- Will you cater the event? How much time does the caterer need?
- What electronic devices will be used (computer, overhead, etc.)?
- Are there accessible outlets?
- What decoration/banners are you using?
- How will training materials be distributed?
- Are there enough garbage cans?
- Who will be responsible for clean up?

Once you have answered the questions, you will be able to make all the necessary preparations and set up the space appropriately.

## FOCUS GROUP

When conducting lunch and learns, you should try to accommodate the desires of your audience. Conducting a focus group is a useful method for determining which subjects you should address in a lunch and learn. Remember that not every topic will work using a lunch and learn format. Still, it is important to have an idea of what your audience finds interesting.

## Conducting a Focus Group:

- Choose 8 to 12 questions to help determine topics.
- Choose employees from different departments; create a broad sample of people who do not work together.
- Arrange a comfortable space, and prepare employees for the time necessary to complete the discussion.

## PRACTICE

Lunch and learns are typically relaxed atmospheres, which is why they are effective. Although they are relaxed, it is important not to become so relaxed that you forget to practice for the event. Lunch and learns are not long. You need to time everything. Be sure to time the presentation, including any presentation materials.

## What to Understand about the Presentation:

- **Content:** Do not wing a presentation. Have the content outlined and written.
- **Delivery:** Determine how you will deliver the presentation.

Practice any group exercises. This helps you work out any kinks ahead of time and determine how long is needed to complete the exercise.

## **PRACTICAL ILLUSTRATION**

Donna was hosting a Lunch and Learn focusing on some new email procedures. She was very familiar with the material, and she did not think that she needed to practice. When she began the presentation, she realized that the slides were not in the order that she thought. Donna had the room wait while she changed the slides to fit the order that she wanted. By the time she finished the presentation, there was not much time left to answer questions. Some people stayed late to clarify the information.

*The creation of a thousand  
forests is in one acorn.*

RALPH WALDO EMERSON



# CREATING THE CONTENT (I)

Lunch and learns are more than social activities. They are used to convey important information, which is why you cannot underestimate the importance of the content. The content that you use should be focused and relevant. It should also be informal and interactive to better engage your audience.

## PICKING THE RIGHT TOPIC

It is imperative that you choose the right topic for a lunch and learn. Remember that not every topic is suitable for lunch and learns. Complex or formal instruction is not suitable for the setting. You need to choose a topic that can be covered in a short period of time. For example, email etiquette or a vendor presentation would be useful in a lunch and learn setting. Introducing a new method of production would probably not be effective for lunch and learns. The best way that you can choose the tight topic is by referring back to the information gleaned from your focus groups and determining which ones are suitable for the social setting.

## **HANDS ON WORKS GREAT**

Lunchtime is not an easy time to hold the attention of your audience. They may be suffering the effects of low blood sugar or food coma, depending on when you start the presentation. Expecting people to give all of their attention to someone talking in a dimly lit room while showing charts is not reasonable. You are responsible for engaging your audience. The best way to connect with your audience is to bring hands on materials. Demonstrations are the most common method of hands on training. Once you demonstrate an activity, you need to monitor the performance of the participants and coach them to success. Not every lunch and learn can use demonstrations, but there are other hands on activities.

### **Examples of other Hands on Activities:**

- Quizzes
- Props
- Small group exercises

## **STAY FOCUSED**

Lunch and learns are brief, and it is important to stay focused. Do not go off topic during the presentation. This is why practice is so important to the presentation. Look over your outline carefully to make sure that you do not wander off topic. Additionally, you need to make sure that all of your materials are focused and follow along with the presentation that you are giving. There is nothing more annoying than finding that the materials are

out of order. Do not provide off topic materials for a lunch and learn. This can be confusing during the meeting and may cause people to wander off mentally. If you have follow-up materials, offer them to the audience after the presentation is over.

## **KEEP IT INFORMAL**

While you will be presenting information at a lunch and learn, you must remember that it is not your traditional classroom setting. You must keep lunch and learns informal for them to be effective. The setting should be casual, and questions should be encouraged. Make lunch and learns as interactive as possible with hands on materials, games, icebreakers, small groups, etc. You should also consider incorporating Q&As and chat sessions into the program. Feedback from the participants will help you determine which activities are effective for you and which ones are not.

## **PRACTICAL ILLUSTRATION**

Thomas needed to introduce the new operations system to his employees, and decided that the most cost effective way to do it was through a lunch and learn. His presentation included over 100 slides of information, and the handout material was 120 pages. Halfway through the meeting, he noticed that people were not as focused as he would have liked. He told everyone to hold their questions till the end. No one, however, asked any questions when the presentation was over. A very tired audience slipped back to work. A few weeks later, only a handful of employees mastered the new system. Thomas felt that the training had been a waste of time.

*Our life is the  
creation of our mind.*

B U D D H A



# CREATING THE CONTENT (II)

The content that you create for a lunch and learn must be able to engage the audience. Make your presentations interactive and tailor them to the needs of each group you meet. Review each presentation carefully, and, finally, back it up to be safe. By following a few basic steps, you improve the chance of success when you present the content that you create.

### MAKE IT INTERACTIVE

Presentations need to be interactive in order to be successful. PowerPoint and other programs will help you create interesting visuals, but pictures alone are not enough to make the audience interact. Interactions can be facilitated by different activities.

#### **Interactive Activities:**

- **Games:** Games can be used as icebreakers or to make a point. Choose a game that fits with your topic and your audience.
- **Round tables:** Round tables facilitate conversation between presenters and members of the audience. Round tables work best if the audience knows to prepare ahead of time.

- **Stories/Testimonials:** Ask a few people to share relevant stories or testimonials and take questions. People engage with person stories.

Regardless of the activities that you choose, it is imperative that you consider time constraints. The activities should enhance the information that you provide, not take its place.

## REVIEW IT THOROUGHLY

When creating a lunch and learn presentation, you must review it thoroughly. You must find a way to present all of the information that your audience needs to know in an interesting format while staying within the time frame. Review the content carefully before each presentation.

### What to Review:

- **Basic Points:** It is imperative that you convey information completely. Take a moment and review the points of the presentation. Does the content contain all of the information? Make any adjustments as necessary.
- **Time:** Review the time that each component of the presentation will take. Does the entire lunch and learn fit with the time constraints? Practice will help you determine the time for the time of each presentation.

After careful review, adjust the content and time for each section. Review it at least twice to be certain that the timing.

## **CREATING A CUSTOMIZED PRESENTATION**

It is important that you customize each presentation for your audience. You may give the same presentation more than once, but you should never give it in exactly the same way. You need to consider your audience. Ask a few basic questions for your audience.

- What is the general age of the audience?
- What is their skill level with the subject?
- Is the lunch and learn voluntary?

Once you have identified your audience, you can customize your presentation using props, tools, and demonstrations. Each one can be customized to fit the needs of your audience.

## **BACK IT UP!**

Once you have reviewed and customized the content, you must back it up. Do not take the risk of losing your information and hard work. Fortunately, there are different ways to back up your presentation. You simply need to choose the method that you feel comfortable using. There are basic physical methods such as flash drives and external hard drives. There are also online options, depending on the programs you use, such as the Cloud. Online sources are useful if you forget physical copies, but you must examine the security. There are also offsite back up options available. In the end, it does not matter which type up back up you choose. You simply need to back up your information regularly.

## **PRACTICAL ILLUSTRATION**

Sam was certain that his lunch and learn was going to be a success. His presentation was interactive. He had games, props, and demonstrations ready. This would not be a boring lecture. On the day of the presentation, his game was a success. The students had fun, but they played longer than he expected, and the demonstration ran over by 10 minutes. Altogether, he was 20 minutes over and had to condense his teaching time significantly. He was not sure how much of the information the audience was able to retain.

*You have to learn the  
rules of the game. And  
then you have to play  
better than anyone else.*

ALBERT EINSTEIN



# DURING THE SESSION

Once you have created the content, it is time to conduct the session. Prep work is essential to success, but you must be able to follow through during the session. When presenting your material, it is imperative that you introduce a few, simple ground rules, open quickly, and follow up. No matter how well you run a session, you must be flexible. The ability to adjust quickly can mean the difference between success and failure.

## GROUND RULES

You need to have a few basic ground rules established before the session begins. Ground rules will set the tone of the meeting. They also lay out clear expectations for the participants. Ground rules will cover the education, behavior, and communication. You should establish ground rules based on the topic covered and your audience.

### Common Ground Rule Topics

- Cell phone use or lack thereof
- Respectful communication
- Transitions
- Use of equipment/props

The rules need to be basic, and you should be able to explain them quickly. Regardless of the ground rules that you choose, you need to explain them before the presentation begins.

## **QUICK OPENING**

The opening of a presentation will establish your connection with the audience. A quick and engaging introduction will have a better impact than a long, drawn out speech. There are different ways to create an opening. You may choose a story or present facts about the business environment. Regardless of your choice, you must develop interest within the first few minutes. Your opening needs to get straight to the point. Explain the purpose of the presentation and give specific examples of how it will help your audience. You may establish your expertise, but you should do it in a single sentence; do not list every achievement.

### **Example:**

*The economic recovery remains soft, but financial success is still possible. Companies that have adapted this training have seen, on average, a 20% ROI. So, let's begin the introduction to profitability in the workplace.*

Remember that a quick opening is essential to your success. If you lose your audience's interest early on, it will be difficult to gain it later in the presentation.

## **PARKING LOT**

Lunch and learns are very limited on time, which is why the parking lot can be an invaluable tool. This tool allows you to place off-topic topics in “the parking lot” and return to them when the time allows. The parking lot is only effective if you explain its role upfront and outline the topics covered. When using the parking lot, you might want to assign someone to take notes on topics that are set aside.

Typically, you address parking lot items at the end of a session. Given the length of time during a lunch and learn, however, this will probably not be possible. Be prepared to discuss topics in email after the meeting.

## **ADJUSTING ON THE FLY**

No matter how well you prepare your presentation, you will also need to prepare for the unexpected. This requires flexibility and the ability to adjust on the fly. Adjustments will happen for a number of reasons. Participants will move around. Spills will cause disruptions. Equipment can malfunction last minute, sometimes because of a spill. When these interruptions do occur, you must remain in control. It is a good idea to come in with preparations such as cleaning supplies for spills, replacement materials, etc. Be ready to think on your feet, and keep your attitude positive. Panic or anger will alienate your audience.

## **PRACTICAL ILLUSTRATION**

Michael was prepared for his lunch and learn. He checked the equipment and rehearsed every aspect of the presentation and interaction. During the presentation, however, he seemed to lose control. He began with some biographical background to show his expertise and introduced his team. He saw a few people looking at their phones. Later, one participant kept bringing up points that did not contribute to the main topic. Answering the questions lengthened the presentation, and Michael tried to condense the information to stay within the time constraints. Finally, someone knocked over a row of chairs in the back of the room.

*Cultivation to the  
mind is as necessary as  
food to the body.*

MARCUS TULLIUS CICERO



# FOOD AND FACILITIES

The food and facilities are just as important to the lunch and learn as the presentation itself. When teaching in a lunch setting, you face a number of problems. You need to make informed decisions about the food, and make sure that everyone's needs are considered. Make a point to consider the cleaning needs before and after the meeting. Additionally, request feedback from participants to improve the lunch and learns in the future.

## PROVIDING FOOD?

Providing food for participants may be easier for you, particularly if you choose a location that caters. Additionally, food is a wonderful incentive in lunch and learns. When you do choose to provide food, you must consider the needs of your audience. It is best to provide a fair selection that accommodates an eclectic group.

### **What to consider when providing food:**

- Vegetarians/Vegans
- Allergies
- Religious dietary restrictions
- Tastes and preferences

Remember to try to provide something for everyone. Reaching out to the participants ahead of time will help you make your menu choices.

## PEOPLE BRINGING THEIR OWN

In some settings, it may be easier for people to bring their own food. For example, it may be easier if the lunch and learn is last minute and there is not time to cater a meal. There are, however, considerations that must be made when people bring their own food:

- **Allergies:** Many people have severe allergic reactions to foods such as nuts and citrus. Even minor exposure can cause a reaction.
- **Smell:** A diverse group can lead to a room full of conflicting odors and smells. The smell can remain long after the meeting.
- **Mess:** Some foods are messier than others. When you control the menu, you can control the level of mess during the presentation.

When you have people bring their own lunch, it is a good idea to send out a memo or email informing them of any allergies and reminding them to be considerate.

## EAT DURING OR AFTER?

When do we eat? Everyone at a lunch and learn will want to know the answer to this question. You may choose to eat during the presentation or after the presentation. Allowing people to eat during the presentation addresses the problem of a hungry audience who is distracted by the

smell of food. On the other hand, eating can be its own distraction, and you run the risks of disruptive spills during the presentation. Eating after everything is finished limits spills distracting from the presentation, but people will wait impatiently for their food, making it difficult to keep their attention. They are less likely to ask questions if they believe that it will lengthen their wait time.

A useful compromise is allowing people to eat during the Q&A. Conducting a Q&A during the meal limits distractions during the presentation. The participants will not have to wait through the Q&A for the opportunity to eat. Additionally, having lunch at this time makes the Q&A a social event and encourages people to communicate.

## **CLEAN UP OR TEARDOWN**

Cleaning up and tearing down are, ultimately, the responsibility of the host. While caterers and restaurants often clean up after the event, you need to make sure that you iron out all of the details.

- **Cleaning before:** Who is responsible for cleaning before the event if it is not hosted in a restaurant? Caterers bring food; they are not always responsible for cleaning and setting up the event. Coordinate with the manager of the location site to determine what you need to do.
- **Set up:** Who will move tables and chairs, and who will set up props and electronics?

- **Cleaning after:** Who will clean the room after the event? This includes removing food, taking out trash, vacuuming, replacing tables and chairs, etc.
- **Teardown:** Make sure someone is responsible for equipment, props, tools, handouts, etc.

You do not want any surprises when it comes to the cleaning up and tearing down. You risk losing your deposit and damaging your company's reputation.

## **PRACTICAL ILLUSTRATION**

Gina's first lunch and learn was a disaster. She found a cheap venue, and decided to have it catered by a nearby fast food establishment. She arrived 15 minutes early to find the tables and chairs stacked in a corner. She worked quickly to put the room together, but this made it impossible for her to set up the electronic equipment before the participants arrived. The food arrived, and Gina wasn't sure where to put it. She placed it on a table while she continued to set up the room. She did not plan on having people eat during the presentation, but people just grabbed food and ate during her lecture.

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

MAHATMA GANDHI



# TAKE AWAY MATERIAL

You need to consider the subject of take away material. What will you provide? What type of follow up will be necessary? Take away materials include handouts, quizzes, self-tests, websites, reference materials, and white papers. Your topic will determine what you materials you need to provide. Always prepare your materials ahead of time.

## HANDOUTS AND TAKE AWAY MATERIAL

Handouts are useful tools that allow the participants to follow along with the presentation and take notes. Taking notes helps participants engage with the material on a personal level. It is important, however, to make sure that handouts are focused and not filled with too much information. Handouts are supplementary material. They should not provide all the information in your presentation or people will simply read ahead and not pay attention.

### **Handouts:**

- Basic points
- Room for notes
- Interesting graphics

When you create take away material, make sure to review it carefully. You do not want to send out the wrong information. Include your contact information in the handouts, and make more than enough copies for your class. You never know who will need more than one.

## **QUIZZES OR SELF-TESTS**

Quizzes and self-tests are staples of the business world. People like taking quizzes and self-tests and they are often inspired by their results. Quizzes and self-tests can seem daunting to create, but you do not have to make complex exams. Simply create quizzes for your area of expertise and self-tests that help you determine how well participants understand the information you are presenting. There are a few basic points to remember when making quizzes and self-tests.

- Create questions based on clear objectives or skills.
- Identify at least three different levels of skill when creating answer choices for self-tests.
- Make sure that the answer choices are not confusing.
- Test your quizzes and self-tests.

You can ask friends and colleagues to review your quizzes and tests to help you create the most effective materials.

## **WEBSITES WITH MINUTES AND SESSION NOTES**

Participants will find it useful to refer to minutes and sessions notes before the meeting. Minutes are official records of everything that occurred during a meeting, and you might not keep minutes in a casual setting. Session notes are notes over the information presented during the lunch and learn. Making the notes and minutes from past sessions available online provide participants with the opportunity to look up the information and prepare for their own lunch and learns.

It is also a good idea to link reference materials on a website with the notes and minutes. Video clips will give potential students the opportunity to understand what they can expect from the class. Keeping this information online will also provide the participants with valuable reviews after the lunch and learn is over.

## **REFERENCE MATERIAL OR WHITE PAPER**

Participants will want to consider what they have learned after the lesson, and they will probably want to research the subject further. This is why you should provide reference material or white papers for the participants. Reference materials that you may choose include relevant news stories, statistics, and research. You may also choose to provide reference books if you can find ones that are inexpensive.

White papers are written as authoritative reports or informative papers that help organizations relate to customers. White papers are brief but effective means of communication that illustrate the importance of the

material and how it can benefit the participants. Most companies create their own white papers, which allow them to tailor their information. Providing a white paper and reference material helps students further their understanding of the subject and assist them in explaining the topic to others.

## **PRACTICAL ILLUSTRATION**

Sara prepared for her lunch and learn, including the take home materials. She created in-depth handouts that explained every point of her presentation. She left some space for participants to write notes, but she noticed that only a few people bothered to take notes. Also, people read ahead of her presentation. She found it difficult to focus their attention, and they did not ask many questions during the Q&A portion of the event.

*All things are difficult  
before they are easy.*

THOMAS FULLER



# DIFFICULT SITUATIONS OR PEOPLE

Whenever you host a lunch and learn, you will have to deal with people. Most of the people you encounter will be pleasant. There is a small percentage, however, who will make your job difficult. It is imperative that you learn how to handle difficult situations or people before you encounter them. Being prepared for the worst will enable you to give the best presentation possible.

## DISRUPTIONS

Disruptions are annoying. They take valuable time away for presenting information, and they cause everyone to lose focus. It is important to understand that most disruptions are not deliberate attempts at sabotage. So, remember to stay calm and be polite when handling disruptive behavior. Being polite does not mean ignoring poor behavior; you must address the disruption immediately or you risk the entire session unraveling.

### **How to Handle Disruptions:**

Most distractions can be prevented with your ground rules and using the parking lot. It may be necessary to take remind students of these guidelines during the presentation.

You may assign tasks to participants who seem to need extra attention. Tasks may include keeping time, taking notes, monitoring the parking lot, etc.

In extreme cases, you may need to confront someone directly. Try to address the person away from the group.

If a participant is unstable or dangerous, do not hesitate to call security.

## **FOOD ISSUES**

Food can be disruptive, but many of these disruptions can be prevented by completing your prep work. Many office buildings and offsite locations have food policies, which you should consult before making any decisions regarding food. Even if the location does not have food policies in place, it is a good idea to consult the participants about common food issues.

### **Common Issues**

- Smell
- Mess
- Allergies

Allergies are always a concern, particularly when people are eating in a confined space. Additionally, smell is exacerbated by enclosed spaces, and some foods are more likely to cause messes than others. Determining the menu based on a dialogue with participants will diminish food issues and help the event run smoothly.

## SENIOR MANAGEMENT BUY IN

The buy in of senior management is useful in any business endeavor. The same rule is true of lunch and learns. When senior management is involved, the participants see the event as credible. This will limit the number of difficult students who attend and your lunch and learns and draw the truly motivated.

### Ways to Create Buy in

- Make the need for change apparent.
- Show the value of the lunch and learn.
- Provide a detailed vision.
- Be willing to be flexible in the implementation.

Do not underestimate the importance of management buy in. It will trickle down to employee buy in and improve your lunch and learn.

## PEOPLE NOT PARTICIPATING?

Everyone who presents at lunch and learns will face the dilemma of participants who do not participate. Lunch and learns without participation are awkward and boring. Engaging participants will improve the chances of participation. There are a few ways to liven the meeting and improve participation.

- **Be Interesting:** Make the topic, visuals, and delivery as interesting as possible. A monotone drone of technical jargon will not generate interest or participation.
- **Create the environment:** The set up can affect participation. Setting up the room so that people face each other is an incentive for participation.
- **External incentives:** Provide incentives to people who participate. Consider handing out candy or other prizes such as coupons or gift cards.

## PRACTICAL ILLUSTRATION

Oliver was disappointed after his first lunch and learn. Many of the participants did not seem to have any interest in the topic at all. One person told him that the company strongly recommends taking these classes occasionally, but management never follows up. The attitude in the room was that the lunch and learns never change anything. During the presentation, no one participated. He even saw people playing games on their phones while he was talking. Oliver considered never hosting a lunch and learn again.

*Yesterday's home runs  
don't win today's games.*

B A B E R U T H



# WHAT A LUNCH AND LEARN IS NOT

Lunch and learns that fail often do not meet the criteria of a lunch and learn. In order to be successful, it is important to define what a lunch and learn is and what it is not. By creating a lunch and learn according to the appropriate definitions, you increase your chances of success.

### HEAVY OR SERIOUS TOPICS

Lunch and learns are not the appropriate setting for heavy or serious topics. The short amount of time requires that you be concise and avoid anything serious. Serious topics require much more time than you have to offer. This does not mean that lunch and learns are not informative, they can be extremely useful training tools. Simply use basic topics such as the ones below:

#### Topic Examples:

- Business etiquette
- Email etiquette
- Social media
- Managing change
- Team building

You may follow up with further training if there is a need for a more in-depth study later. You should, however, avoid complex information that you cannot adequately cover in a single session.

## **REQUIRED TRAINING**

Lunch and learns are not useful for most required training such as health and safety training. This type of training is legally mandated or company mandated. Required training requires a level of focus that you cannot provide in a lunch and learn. For example, you would not use the lunch and learn for training on harassment or OSHA standards. Additionally, required training typically demands the taking attendance, which is difficult in lunch and learns.

Lunch and learns should be optional. This places the participant in control of the learning experience. Making lunch and learns required does little to motivate people. Optional lunch and learns will help weed out disruptive people and ensure that the participants have an interest in the subject matter.

## **REPLACEMENT FOR TRADITIONAL TRAINING**

Lunch and learns are not replacements for traditional training sessions. They should be supplementary learning, or it can be used to introduce a new topic. The lunch and learn can be used to provide training in work skills, employee development, product training, and life skills. Traditional training takes longer than 30 to 40 minutes and often requires hands on work to be effective.

## **Methods of Traditional Training:**

- Demonstrations
- Coaching
- Computer training
- E-class
- Team training
- Lectures

While lunch and learns may integrate aspects of traditional training, they are not the same. Lunch and learns are not long term training programs.

## **JUST A FREE LUNCH**

There is a saying that there is no such thing as a free lunch. You need to keep an eye out for people who are only interested in the food. People who want a free lunch have no interest in learning and are more likely to cause disruptions during the lunch and learn. There are a few ways to spot people who only came for the food:

- They only ask about the food.
- They do not pay attention.
- They may try to slip out early.

You should encourage people to come only if they are interested in the material to prevent problems. If you notice offenders, ask them why they

are attending. This lets them know that you are aware of their behavior. You may make a ground rule about participation. Additionally, choosing to serve lunch during the Q&A will discourage people from coming who do not want to sit through the event.

## **PRACTICAL ILLUSTRATION**

The CEO of EGC Beauty was looking for a way to trim the training budget, and decided to try using mandatory lunch and learns to instill new information. The lunch and learns were frequently scheduled because of their short time frame. After three months, he discovered that employees did not seem to fully understand the information being presented. Additionally, he saw a rise in turnover. According to interviews, employees were choosing to leave because they felt that their breaks had been stolen. The CEO chose to reinstate other training methods.

*You can't hire someone to  
practice for you.*

JACKSON BROWN



# BEST PRACTICES (I)

There is always room for improvement, even in lunch and learns. Always find what works best for you and choose to implement the best practices. Tweak your actions based on feedback and involve employees. Above all, remember that you need to create a comfortable environment that engages your participants.

### **OBTAIN FEEDBACK AND TWEAK**

Feedback will allow you to lead the best lunch and learns possible. You need to solicit feedback from your participants. Do not simply rely on them to volunteer their thoughts. Creating an evaluation form will help you collect feedback. You can pass the form out at the end of the lunch and learn and ask the participants to take a few minutes to fill it out. Make sure that the form is brief and asks pointed questions. You should also leave some space for comments.

Review your evaluation forms carefully to discover the consensus. Do not make adjustments based on the opinion of a few. Tweak the lunch and learn based on repeated feedback. For example, if 60% of your participants think the Q&A is too long, consider shortening it. You should

continually ask for feedback so that you can continually improve your presentations.

## **UTILIZE STAR EMPLOYEES**

When implementing lunch and learns, you will need to recruit talent. Consider utilizing star employees rather than looking for outside talent. Internal employees are wonderful sources of specialist knowledge and technical knowledge. They are familiar with the company's policies and procedures. Additionally, they have the respect of the other employees.

You should already have identified the star employees from their performance. Once you determine their areas of expertise, explain to them how valuable their skill sets are and that other employees would benefit from their knowledge. Remember that you are asking them to take on more work, so be courteous. Persuade employees to volunteer to teach; do not demand that they do. A coerced teacher is not a very effective one. You should consider providing incentives and rewards for their efforts.

## **PROVIDE AN AGENDA AHEAD OF TIME**

Lunch and learns are casual settings, but they still need to have basic agendas. These agendas should be provided to participants ahead of time. For example, you can email an agenda after the participants RSVP. The agenda will help keep you on track, and it will prevent any confusion among participants. The agenda will vary according to the topic addressed, class, etc.

### Sample agenda:

- 10:55 am Arrive/check in
- 11:05 am Introduction
- 11:10 am Interactive presentation
- 11:40 am Q&A (lunch)
- 12:00 pm Wrap up

The agenda will help keep everyone on the same page. It is not, however, set in stone. Allow for some flexibility during the actual meeting. Remember to keep the setting casual.

### KEEP THE SESSION CASUAL AND LOOSE

Lunch and learns are effective when they take place in relaxed settings. Remember to keep the session casual and loose. There are a few ways that you can help set the tone for your lunch and learn:

- **Create an atmosphere:** Have everyone sit around a single table; avoid lecture style seating.
- **Use humor:** Engage people with humor.
- **Dress casually:** Business casual attire is more relaxed than a suit.
- **Invite discussion:** Encourage interactions and conversations.

The tone that you adopt for your lunch and learn will depend on your personal style and the topic. In every situation, however, you must help the participants relax and engage with the material you are teaching.

## **PRACTICAL ILLUSTRATION**

Ken wanted to tap into the talent in his office. He took the time to review employee evaluations and identify their strengths and weaknesses. Once this was done, he sent an email to his exceptional employees, asking them to teach lunch and learns. He was surprised when only two people told him they wanted to teach. He was not sure what to do, and considered making teaching part of their job requirements. After speaking with his employees, however, he realized that some were nervous and others were concerned that teaching would interfere with their daily activities. Ken decided to offer his employees encouragement and the incentive of an extra day off for every three classes taught. The response was positive, and Ken's company was able to host a lunch and learn every week.

*Knowledge is of  
no value unless you  
put it into practice.*

ANTON CHEKOV



# BEST PRACTICES (II)

Part of successfully implementing lunch and learns is recognizing when they will be the most effective. Remember that lunch and learns are not useful in every training endeavor. They can be used as refreshers, Q&A sessions. Additionally, they provide networking opportunities and are extremely effective when scheduled regularly.

### USE IT AS A REFRESHER

We have already established that the time constraints on lunch and learns make it impossible to address complex topics. They are useful, however, as refresher courses. You should consider scheduling lunch and learns as follow-ups to traditional training courses. For example, you could host a lunch and learn the week after training in new procedure. Refresher courses allow you to address any learning gaps in that participants have. By this time, the participants will have experience using the training by the refresher course, and they will ask educated questions. Refresher courses will also provide feedback on any weaknesses in your traditional training courses.

## NETWORKING OPPORTUNITY

Lunch and learns are more than learning opportunities, they are also effective networking tools. The voluntary nature of lunch and learns help connect people who have similar interests. It is up to everyone attending to make the most of the networking opportunities. Simply showing up and eating will not create meaningful connections.

### How to Network:

- **Come early:** Take the opportunity to meet people before there is a crowd.
- **Ask questions:** Ask questions and share your personal stories.
- **Exchange information:** Bring business cards to exchange.
- **Follow up:** Email new connections to foster a relationship.

Do not make networking too complicated. Use it as an opportunity to meet with peers and share ideas.

## UPPER MANAGEMENT Q&A SESSION

Upper management Q&A sessions are valuable opportunities for upper management to connect with the rest of the company and explore the plans for the future. You may choose to host these once a month or quarterly. The timing will depend on the type of business. Lunch and learns are the perfect setting for this Q&A session because they facilitate the communication. If you attend a Q&A session, take the opportunity to ask questions about the company. It is important, however, to ask

thoughtful questions. This is not a platform for airing grievances or showing off knowledge.

## **PUT IT ON A REGULAR SCHEDULE**

Lunch and learns are effective when they are scheduled regularly. When they occur regularly, people know when to fit them into their personal schedules. Your participants will be prepared, and it is likely that your numbers will grow. People who have positive experiences are likely to recommend the lunch and learns to their friends. Over time, your students will repeat their attendance and bring others with them.

The schedule that you create will depend on the needs of the business. Some companies will benefit from monthly meetings and others from a more frequent schedule. Regardless of how often you meet, you should schedule the lunch and learns at the same time and on the same day of the week. It is a good idea to avoid meeting on Fridays because people are likely to be focused on completing their tasks before the weekend.

## **PRACTICAL ILLUSTRATION**

Bill's company had a history of poor training results, which equaled a 5% drop in revenue during each quarter with change. It was time to alter procedures again, and he was concerned about the loss that the organization would face from the change. He decided to follow up with employees by creating a lunch and learn refresher courses for each

learning group. He attended the first follow up session and was amazed by the results. The employees asked practical questions and came up with suggestions to make the change process easier. There was a small dip immediately after the training, but the quarter ended without any losses.

# CLOSING THOUGHTS

- **Epictetus:** It is impossible for a man to learn what he thinks he already knows.
- **Voltaire:** Judge a man by his questions not by his answers.
- **Proverb:** Some people make things happen, some watch things happen, while others wonder what has happened.
- **Robert Bly:** The best presenters have conversations with their audiences.
- **Alexander Graham Bell:** Before anything else, preparation is the key to success.



**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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