

# **TRAINING MANUAL**

## **Delivering Effective Training**

Mary Kay Beeby

**A Crisp Group Training Program**

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## **Delivering Effective Training**

**Mary Kay Beeby**

Based on the book

*Delivering Effective Training Sessions* by Geri E. H. McArdle, Ph.D.

and

*Training Methods That Work* by Lois B. Hart

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# Introduction

In today's competitive market, organizations must constantly be learning—new skills, new knowledge and new attitudes. We hear the term “learning organization” used often as a way to help groups become more successful. And yet, many organizations have recently reduced or eliminated their training budgets. Where are the experts who will deliver the training to help people become more effective?

An important strategy in becoming a learning organization is individuals taking responsibility for their own development. Fewer development opportunities are mandated, more are encouraged or offered as optional activities. Many companies recommend that employees take their own time to develop themselves. With this in mind, participants have now become “customers” in a training session. If we don't make the experience meaningful, they won't come back!

And what about management? Managers are being asked to coach, mentor and teach their employees. A good manager who can master the techniques of delivering effective training is an excellent resource, both for the individuals in the class and for the training department whose resources are stretched beyond its limits.

With all of these factors in mind, this group training program has been designed to help people of all experience levels learn to deliver effective training. Whether your participants are new trainers, managers or individual contributors, this course will help them develop these skills.

To help you with the task of training these individuals, we have included three of our best books on becoming an effective trainer. You can use these to enhance your training sessions and recommend them to your students as an excellent resource for their own learning.

Crisp Publications produces many resources for trainers. These tools are easy-to-use, friendly and very cost effective. Over 170 topics are covered in our 50-Minute Series books and many come with videos and leader's guides. These programs contain everything you need to deliver an effective training session: instructions, transparency or flip chart masters, a video and participant books. And now with the skills your participants will learn in this program, they'll be ready to succeed!

*Effective Training Skills + Good Materials = Success!*

# One Day Program Outline

(Times will vary depending on discussion.)

## **PART I: INTRODUCTION**

Welcome and Introductions	15 Min.
Objectives and Agenda	5 Min.

## **PART 2: TODAY'S LEARNER**

Best Learning Activity	30 Min.
Video Discussion	15 Min.
Learning Cycle	10 Min.

<b>Break</b>	<b>15 Min.</b>
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## **PART 3: GETTING IT TOGETHER**

Video Discussion	20 Min.
Designing the Session	40 Min.
Small Group Practice	45 Min.

<b>Lunch</b>	<b>60 Min.</b>
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Scavenger Hunt (Optional)	20 Min.
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## **PART 4: TRAINING TECHNIQUES THAT WORK**

Video Discussion	10 Min.
Facilitating Discussions	15 Min.
Small Group Practice	45 Min.
Small Group Presentations	90 Min.

## **PART 5: SUMMING IT ALL UP**

Look At Objectives, Evaluate Session	15 Min.
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# **GETTING STARTED**





## About This Guide

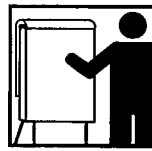
This program is designed for group training in a full-day session. The program script includes suggested questions to help the facilitator keep the session interactive and allow the participants to learn from each other's experiences as well as the provided course material.

## Program Script

The program script is formatted into three columns. The first column, **Format**, contains graphics to provide visual clues about the activity underway. There are thumbnail representations of the actual transparencies that you will display, as well as icons depicting the nature of the instructional material. Here is the legend for those icons:



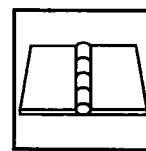
Lecture



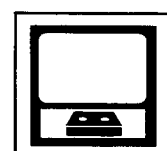
Flip Chart



Exercise



Workbook



Video

The middle column, **Time**, contains target times for each activity. Actual time will vary depending on questions and other interaction of the participants.

The majority of the program information is found in the third column, **Directions**. Two different fonts are used to help the facilitator differentiate between suggested **script** and instructions. Experienced facilitators may not need to follow these directions precisely, but those leading this course for the first time may find that following the directions carefully will help them deliver a more effective session.

## Handouts

Master copies of all handouts are provided. Be sure you make enough copies to distribute to all participants at the appropriate time, as indicated in the Program Script.

## Transparencies

This course is designed to be facilitated using an overhead projector and transparencies. If your facility or instruction style does not accommodate overheads, transfer this information to flip charts or some other medium. Master copies of all transparencies are provided.

## Leading the Adult Learner

Successful program leaders must recognize that we learn differently as adults than we did as school children. Unlike children who may accept information at face value, trusting the teacher to plan the lessons and impart knowledge, adults will judge for themselves what information is applicable and useful. If you use the following adult learning principles to develop training designs and facilitate group sessions, you'll increase the likelihood that participants will learn and apply new skills in their daily lives.

### Adults...

- Need to validate the information based on their beliefs and experiences
- Expect that what they are learning is immediately useful
- Have much past experience upon which to draw
- Have significant ability to serve as knowledgeable resources to the class
- Are problem-centered
- Function best in a collaborative environment
- Want to share in planning

## Conducting Successful Discussions

Since adult learners function best in a collaborative environment, an effective program leader needs to get people talking, asking questions, and comparing experiences. Class participants should be encouraged to help each other with their challenges and share solutions that have worked for them.

An atmosphere of free exchange can be created only when group members see that a mutual sharing of opinions and ideas is welcome without criticism or judgment by the instructor or participants. The skillful use of questions will encourage discussion.

Group participation may be a new experience for some. Never put anyone on the spot. Interaction should be voluntary and supported by positive reinforcement. If the right atmosphere is created, the members will feel comfortable and naturally take part.

Establish a non-threatening environment. Encourage open and relaxed communication. Keep discussions on a positive, constructive note. Keep in mind that there are no wrong responses. If the response you get is not the one you are seeking, ask the group for additional answers.

Ask for volunteers to respond. Do not demand participation by calling on a person by name unless it is to answer a question with an obvious answer or you know the person can handle it. Use the person's name before asking the question so he or she will focus on the question.

You should be constantly on the alert for cues from the group that suggest problems. If participants begin to fidget, look bored, or show by their expressions that they disagree or do not understand, you should ask questions to find out what is going on.

# Planning Ahead

This checklist will help you get prepared for your training session.

- At least 2 weeks prior:**
- Watch the video to understand the flow of the class and the key points that will be presented.
  - Read *Delivering Effective Training Sessions* by Geri McArdle, Ph.D. You may also wish to review *Training Methods That Work* by Lois B. Hart, Ed.D. Part II of this book explains the learning cycle and adult learning principles. Some of the methods demonstrated in the video are also explained in this book.
  - Order *Delivering Effective Training Sessions* and *Training Methods That Work* for each participant. You may also wish to order the third book included with this package to give each participant a beginning library of trainer tools.
- At least 1 week prior:**
- Create your visual aids. You may copy the transparency originals onto transparency film or create your own flip charts. Use ideas from *Graphics for Presenters* to make your charts interesting.
  - Make copies of the assessment quiz for each participant. If you will be using this for both pre- and post-assessment, make colored copies, one for the pre-assessment and one for the post-assessment.
- At least 1 hour prior:**
- Check room facilities and test all audio/visual equipment.
  - Arrange flip chart pages.
  - Verify all supplies are on-hand.
- 30 minutes prior:**
- Arrange name tags, supplies, and refreshments (if appropriate).
  - Be on-hand to greet participants as they arrive. This provides an opportunity to learn a little about each person before the session begins, and participants may have concerns regarding the schedule, message system, or other logistics.

# Materials Checklist

## Audio/Visual Equipment:

- Overhead projector
- Overhead transparencies
- Blank overhead transparencies
- Flip chart pad on easel
- Prepared flip charts
- Blackboard or white board with appropriate markers and eraser (optional)
- Delivering Effective Training* Video
- Monitor and VCR player
- 4 Easels, flip chart paper and markers for small group activities
- Other:

## Other Instructor Materials:

- List of class participants
- Leader's guide and instructional notes
- A small prize for the winner of the scavenger hunt
- Masking tape for posting flip chart pages on the wall

## Participant Supplies:

- Name tent-cards (in lieu of name tags) for each participant. Cards should be made of heavy paper stock with names printed in large letters. Omit titles, but department affiliation is sometimes useful. If names are pre-printed, arrange them alphabetically so participants can pick them up as they enter the room. If blank, put one at each place along with a marker.
- Pens or pencils
- Note pads
- Delivering Effective Training Sessions* book for each participant

- Training Methods That Work* book for each participant
- 2 copies of the assessment quiz for each participant
- A copy of the scavenger hunt handout for each participant
- Blank transparency film and transparency pens
- Other:

**Room Requirements:**

- Break-out rooms for small group discussions

# **INSTRUCTOR'S SCRIPT**



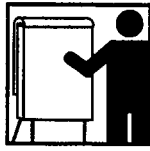


# PART 1: Introduction

## FORMAT

## TIME

## DIRECTIONS



15


## Welcome and Introductions

Welcome participants to the class and introduce yourself. Tell them briefly about your background and how you became involved with training. Emphasize the benefits of being able to deliver effective training sessions. If you have time, share with them some of your best stories about training.

Explain the logistics of breaks, restrooms, refreshments, phone call policy and any paperwork required for this session.

Ask them to introduce themselves: name, background and what they hope to accomplish during this session.


Record their expectations on a flip chart and post on the wall.

OBJECTIVES
<ul style="list-style-type: none"><li>• Understand how adults learn most effectively</li><li>• Learn how to design a learning experience</li><li>• Practice techniques of effective training</li></ul>

<small>DELIVERING EFFECTIVE TRAINING</small>

5

## Objectives and Agenda

Review the objectives of the course. As you present this list, refer back to participants' expectations as often as possible.

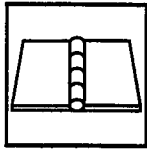
BEST ACTIVITY INSTRUCTIONS—10 MIN.
<ol style="list-style-type: none"><li>1. Brainstorm a list of characteristics of the best training session.</li><li>2. Choose your top three "best" characteristics.</li><li>3. Create a flip chart of your choices.</li><li>4. Be prepared to present your top three choices in each category.</li></ol>

<small>DELIVERING EFFECTIVE TRAINING</small>

Review the agenda with the class. Explain when they will take breaks and ask if they have any questions or concerns about how the process will flow.

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**FORMAT****TIME****DIRECTIONS**

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Explain that the participants' books will be used as resources in the class, but they will not need to follow along in them during the session. Their primary purpose will be as a resource after the session. Much of the material in the books will not be covered during this session.

# PART 2: Today's Learner

**FORMAT**

**TIME**

**DIRECTIONS**

## 30 Best Learning Activity

### Key Learning

The purpose of this small group process is to let the participants draw from their own experience about learning activities. They will rapidly identify the worst characteristics and hopefully will also be able to remember some of their best experiences. In the report back to the full group, the key elements of adult learning will emerge. When you explain the learning model after this group activity, they will understand it better since they have already validated it with their experience. Be sure to refer to their lists to illustrate your concepts.

### Activity


Divide the class into 4 small groups of 4-6 people. Present the instructions for this activity on a flip chart or transparency. Give the group 10 minutes for each category. Then facilitate their report back to the rest of the group. Ask them to post their charts on the wall after drawing the international “not sign” on the worst list.

**“We’ll keep your lists on the walls today to make sure we are learning the techniques that will result in the best, and not the worst, training sessions.”**



**BEST ACTIVITY INSTRUCTIONS—10 MIN.**


1. Brainstorm a list of characteristics of the best training session.
2. Choose your top three “best” characteristics.
3. Create a flip chart of your choices.
4. Be prepared to present your top three choices in each category.



DELIVERING EFFECTIVE TRAINING

**WORST ACTIVITY INSTRUCTIONS—10 MIN.**

1. Choose a spokesperson and scribe for your group.
2. Brainstorm a list of characteristics of the worst training session.
3. Choose your top three “worst” characteristics.
4. Create a flip chart of your choices.



DELIVERING EFFECTIVE TRAINING

**15 Video Discussion****Video Summary (Part 1)**

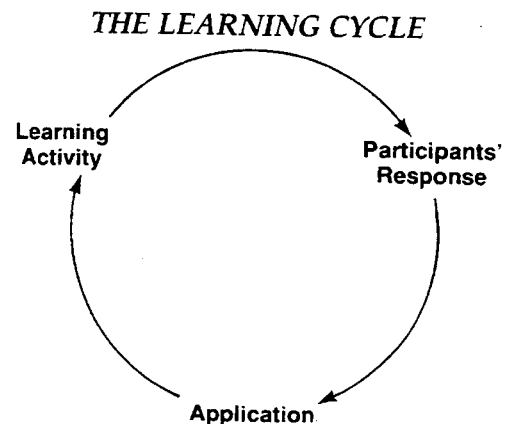
The first part of the video defines training as

*... an organized activity designed to bring about change in on-the-job skills, knowledge or attitude.*

It explains that training is changing and gives a few examples of “olde” training that will relate to the “worst” lists that participants have just created.

**Training Tip:** The most important component of effective training isn’t what you put into it, *it’s what your people take away from it.*

Section I. *Today’s Learner* presents the adult learning process.



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**FORMAT**

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**TIME****DIRECTIONS**

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New training focuses on two-way communication. It looks at

- Outcomes
- Application
- Take-Aways

*Training Tip:* Participants ask two things from training:

1. What's in it for me?
2. How does this transfer back to my job?

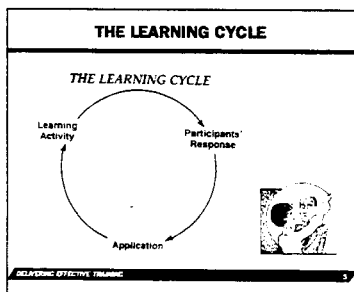


View the Introduction and first section of the video.

Stop the video when you see *Discussion/Interaction*.

**Video Discussion**

**“What are some of the effective training characteristics mentioned in the video that we have already discussed in class today?”**

**10****Learning Cycle**

**“Let's look at the learning cycle presented in the video. What are some examples of a learning activity?”**

(small group discussion, case study, lecture, presentation of a model, games)

**“And what about participant response? Who can give an example of that?”**

FORMAT	TIME	DIRECTIONS
		<p>(answering questions, brainstorming, written activities)</p> <p><b>“Can you give us some examples of application?”</b></p> <p>(action planning, sharing action plans with others, identifying ways to use the learning back in the workplace)</p> <p><b>“Now let’s examine the small group exercise that you participated in earlier. What part of that was the learning activity?”</b></p> <p>(brainstorming the worst/best characteristics)</p> <p><b>“What part of it was the participant response?”</b></p> <p>(Discussion, selection of top three characteristics, sharing of small group’s list with the class.)</p> <p><b>“Have we begun the application phase yet?”</b></p> <p>(We have at least displayed the charts on the wall to use as guidelines as we continue to learn effective training techniques.)</p>
	<b>15</b>	<b>BREAK</b>

# PART 3: Getting It Together

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**FORMAT**

**TIME**

**DIRECTIONS**

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## 20 **Video Discussion**

### **Video Summary (Part 2: Getting It Together)**

This next section of the video focuses on the five-step process of designing effective training sessions.

1. Evaluate your audience
2. Determine your objectives and focus
3. Select your training methods
4. Develop the content
5. Design your graphics and support materials

The factors to consider when selecting a method are

- Complexity of the material
- Level of resistance from your participants
- Time constraints
- Physical setting
- Intimacy factor—how many people and in what space

To support your training points, use:

- Facts
- Statistics
- Quotations
- Comparisons
- Narratives/Stories
- Questions

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**FORMAT**

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**TIME****DIRECTIONS**

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“Now we are going to look at the next section of the video. It will show the five key steps to designing effective training sessions plus some factors to consider when selecting your training methods.”

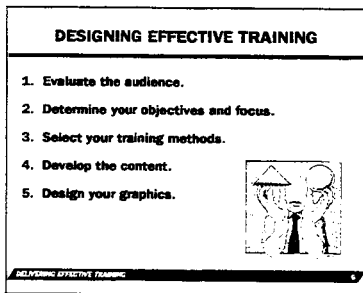
“I’d like you to write down the ideas that you think will help you back on the job. (There’s that application piece!) We’ll be using some of these ideas later in this session.”

View the next section of the video, *II. Getting It Together*.

Stop the video when you see *Discussion/Interaction*.

**Video Discussion**

“What are some of the ideas from the video that you have used or plan to use in your training sessions?”

**40****Designing the Session****Designing the Session**

Conduct a discussion on the five steps, asking open questions about how participants have done these in the past. Be sure to add your own stories when they are appropriate.



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**FORMAT****TIME****DIRECTIONS**

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“Here are the five steps for designing effective sessions. How do you evaluate your audience?”

“What about determining objectives? How do you do that?”

“Why should you try to determine the *least* you want participants to walk away with?”

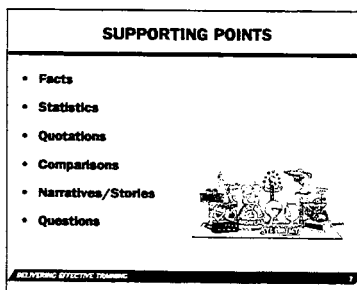
(One answer to this question is that if you must redesign during the session, you know which are the most important points to cover.)

“What is your favorite method to use?”

“Are there times when that method would not be appropriate? Why?”

“Did anyone take notes on how to support your content points? What were some of the ideas in the video?”

“Let’s practice using some of these techniques. Pretend that you are going to make a presentation to your group back on the job about the adult learning cycle. Pick one of these techniques and prepare a statement or illustration of the cycle.”



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**FORMAT**

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**TIME****DIRECTIONS**

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Give participants 5 minutes to come up with a statement or illustration using one or more of the techniques.

Ask for volunteers to share their techniques in front of the class.

**Key Learning**


In addition to illustrating how effective the different techniques are, this activity will allow participants to begin to get comfortable presenting in front of the group.

**45****Small Group Practice****Designing the Session Practice**

(Divide the class back into small groups. During this next 30 minutes they will select a topic and begin to design a 15 minute learning experience to present to the whole group later in the afternoon.

Show them the instructions for this activity. Give them 15 minutes to determine the topic and how they will evaluate the rest of the class. Next let them evaluate the other members of the class for 15 minutes. If there is time before lunch, have them complete the last 15 minute assignment. If not, they can complete this after lunch.

This activity will probably fall very close to lunch, about three hours after the start of the session. If you are running short on time, ask participants to evaluate their audience during lunch.

DESIGNING THE SESSION ACTIVITY INSTRUCTIONS	
<b>15 minutes</b>	
1. Choose a topic that your group wants the rest of the class to learn in a 15 minute session later this afternoon.	
2. Determine how you will evaluate your audience.	
<b>15 minutes</b>	
3. Evaluate your audience.	
<b>15 minutes</b>	
4. Develop your objectives and focus for the session.	
5. Read pages 59-60 in <i>Delivering Effective Training Sessions</i> .	
<small>DELIVERING EFFECTIVE TRAINING</small>	

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**FORMAT****TIME****DIRECTIONS**

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**60****Lunch****After Lunch Start Up**

Review the agenda and let participants know how the afternoon will progress. Review the highlights of the morning session, referring as often as possible to their expectations to confirm they are being accomplished.

If you are right on schedule, facilitate the next activity. If the group needs to complete the group practice from the morning session, you may skip this next activity.

**20****Scavenger Hunt (optional)**

If the energy in the group starts to slow down, insert a lively activity here. A scavenger hunt to find out more about each other will be fun and support their objective to analyze their audience. During the debrief, be sure to point out why you used this activity, relating it to the learning cycle.

Distribute the scavenger hunt handout. Give them only 10 minutes or until one person has filled the entire page whichever is less. Award a prize for the first one complete. Debrief the activity by asking the following questions:

**“What did you learn during that activity?”**

(Diversity of the participants, things that weren't obvious before, etc.)

Scavenger Hunt Handout	
<small>Find a different person in the group for each characteristic. Have the person sign your paper next to the characteristic. The first one who has all the characteristics signed wins.</small>	
1. Has the same profession as you do	_____
2. Has the same favorite hobby as you do	_____
3. Has the same number of children as you do	_____
4. Has no children	_____
5. Was born in the same decade as you were	_____
6. Plans to retire within five years	_____
7. Works out three times a week	_____
8. Is on his/her third career	_____
9. Likes to read suspense novels	_____
10. Listens to radio tapes in the car	_____
11. Would rather work in an office than outside	_____
12. Has the same birthday month as you do	_____
13. Likes to hike and camp	_____
14. Is currently taking a class outside of work hours	_____
15. Reads every night before going to sleep	_____

DELIVERING EFFECTIVE TRAINING

FORMAT	TIME	DIRECTIONS
		<p><b>“How will that make a difference to your training design?”</b></p> <p>(They should design multiple ways to present the learning experience to appeal to the variety of people in the classroom.)</p> <p><b>“This exercise was fun and a little silly. Why do you think we did it?”</b></p> <p>(To learn more about each other for our presentations, to wake people up after lunch, to drive home the point that training sessions will be made up of people with very different needs.)</p> <p><b>“Let’s step out of the learning process from this activity now and look back at the learning cycle model. What stage of that cycle did we just go through?”</b></p> <p>(We just solicited participant’s responses after the learning activity of the scavenger hunt. This is a good time to emphasize the importance of debriefing an activity. Debriefing an activity allows participants to learn from each other and it allows the facilitator to make sure the key learning points were realized.)</p> <p><b>“Now that you’re all awake, turn to page 103 in <i>Delivering Effective Training Sessions</i> and read about Overcoming After-lunch and 5 o’clock Syndromes. Read 104 and 105, too.”</b></p>

# PART 4: Training Techniques That Work

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**FORMAT**

**TIME**

**DIRECTIONS**

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## 10 Video Discussion

### **Video Summary: Part 3: Training Techniques That Work**

This final section of the video demonstrates many of the techniques used by effective trainers including:

- The Room
  - Lighting
  - Ventilation
  - Neatness/clutter
  - Media
- The Warm-up
- The Orientation
- Introduction
- The Icebreaker
  - Quick Quiz
  - Interview and Introduce
  - Jot down key point
- The Discussion
  
- Art of the Question
  - Open vs. Closed
  - Individual
  - Responses
- Case Studies and Role Plays
- Games
  - Energy
  - Risk taking
  - Involvement
  - Competition
  - Fun
- The Close

FORMAT	TIME	DIRECTIONS
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“Now we are going to look at the final section of the video. It will demonstrate some of the methods that effective trainers use to make their session interesting and productive.”

“Be sure to write down the techniques you’d like to use in your upcoming learning activity.”

View the final section of the video, *III. Training Techniques That Work*.

**Video Discussion**

“Did you get some good ideas for your training session? I won’t ask you to share them since you’ll want those to be a surprise later. Let’s look at one of the techniques that was mentioned but not explored in depth.”

**15 Facilitating Discussions**

“Asking open-ended questions to encourage participation is a key skill in delivering effective training sessions.”

“What is the difference between open- and close-ended questions?”

(Generally, a closed-ended question calls for a one word response. An open-ended question calls for an explanation.)

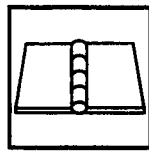
FORMAT	TIME	DIRECTIONS
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**“When would you use open-ended questions?”**

(To encourage participants’ responses to a learning activity, to help participants learn from each other, to check for understanding.)

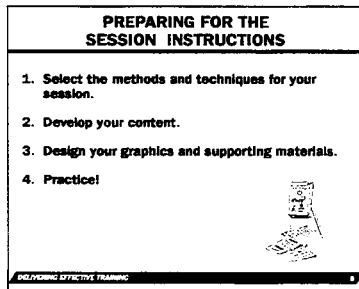
**“When would you use closed-ended questions?”**

(To help them recall facts, to close a discussion when you are short of time or it is not contributing to your objectives.)



Have participants read pages 85–88 in *Delivering Effective Training Sessions* to learn more about how to encourage interaction.

**“You’ll be using some of these techniques in our next exercise.”**

**45 Small Group Practice****Preparing for the Learning Session**

**“Now it is time to put it all together. You have completed the first two steps in designing your session—evaluating your audience and determining your objectives and focus. Now you need to select your methods, design your content and develop your graphics and supporting materials.”**

Give each group a set of materials including flip chart paper and markers, blank transparency film and pens. Encourage the groups to use their participant books as a resource during this preparation.

Send the groups into break-out rooms to work on their presentations for 45 minutes. Be sure to monitor the time and remind them with about 15 minutes left that they should be practicing now.

**90 Small Group Presentations**

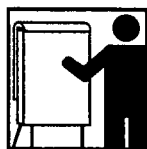
Call the small groups back into session. Ask each one to present its 15-minute session. When the session is over, ask the participants to note what the groups did that contributed to their learning experience and to also jot down ideas for improvement.



Facilitate a feedback discussion after each group presents. First ask the group to identify what it did well and what it would improve for next time. Then ask the rest of the class the same two questions. Finally add your own feedback.

Congratulate all the groups on their efforts.

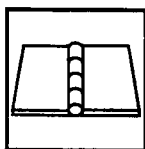
## 15 **Look At Objectives, Evaluate Session**



**“Let’s look back now at your expectations for this class. Have we accomplished what you expected?”**

**“Now let’s do some action planning so you can accomplish that last phase of the learning cycle, application.”**

**“Turn to the Notes page at the very end of *Delivering Effective Training Sessions*. Make two headings on the first note page.**



*When I will first use these new skills:*

*Additional areas I want to learn about and how I will learn:*

**“Fill out both of these categories and if there is time, share your plans with your small group.”**

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**FORMAT****TIME****DIRECTIONS**

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**Evaluate**

Use either a written form or allow participants to discuss:

1. What did you gain from this session?
2. What are your recommendations for improvement?

**TRAINER NOTE**

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