

# TRAIN

the Trainer



***VP University***



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## Play “Host”

As a facilitator, you are the “host” of the event. The participants are “guests.” If you imagine yourself in the role of host, you will very naturally become an excellent facilitator for the training event. Remember what it feels like to be a student not familiar with the facilitator, the physical setting, or the material and content.

## Be concerned with the welfare of your participants

This includes everything from physical comforts to the participant’s learning and development needs.

- ❖ Be sensitive to the temperature of the room. Do your best to eliminate the distraction of excessive heat or cold. Remember that you may be the hottest person in the room, because you will be working the hardest. You may need to sacrifice your own comfort in order to enhance the learning environment for your participants.
- ❖ Make refreshments available when possible and appropriate.
- ❖ Arrange the room so that everyone has an unobstructed view of the visual aids.
- ❖ Place the video screen or monitor at an angle that is visible to everyone in the room.
- ❖ Provide a clean and tidy environment.
- ❖ Make participants feel comfortable through friendliness and introductions to other participants when required.
- ❖ Be ready to read the readiness level of each participant.
- ❖ Be open to the learning and development needs of the group, and those of individuals. Adjust where possible.



### As a “Host/Facilitator”

- ❖ Be prepared. This includes room set-up and being sure that audio and visual aids are in place and working. All materials should be in place. Advanced preparation sends a number of important messages:
  - That you “know your stuff.”
  - That you care about the participants.
  - That you actually thought about them and this class before showing up.
  
- ❖ Be available before class to greet people and help them settle into a comfortable learning environment.
  - This means your preparations should be complete at least 15 minutes before class begins so that you can spend those few minutes focusing on your participants needs.
  - Those few minutes before class begins are an ideal time to learn about the learning needs of each individual.



## Keys to Effective Facilitation

### Project your Enthusiasm

- ❖ Show excitement
- ❖ Be fun
- ❖ Have fun

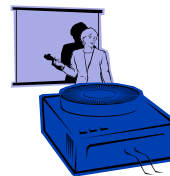
You will be setting the tone of the learning session. Enthusiasm is contagious. Fun is a vital key to an effective learning environment.

### Read the Participant's Needs

By paying attention to the faces and body language, you can tell if a break is needed, if content is understood, if questions need to be answered, if the room is comfortable. Learn to read the group at all times.

### Speak TO the Group

- ❖ Avoid reading long sections
- ❖ Maintain eye contact
- ❖ Don't turn your back on the group while speaking (such as when writing on the flip chart)
- ❖ Prepare major flip charts in advance



## Notes

### Set an Appropriate Pace

Going too fast or too slow eliminates learning. By “reading” the group, you’ll be able to judge what pace is best for all participants. It’s easy to lose track of time. Remember to schedule breaks or call them when you can read that the group needs one.

### Maintain or Enhance Self-Esteem

A positive learning environment is most effective. If learners feel their questions and contributions are of value, they will be more participative and learn more. Remember to elicit questions and comments often, especially as you segue to another topic.

### Listen!

Listen and work to understand your participant’s. This is an often-overlooked facilitation skill. By listening, you will learn which participants are learning what, what strengths they possess, what their learning needs are, as well as other valuable information that will enhance the learning process.



### Involve Participants

Facilitators don’t have to do all the talking! You, and others in the room will learn by the contributions of participants.

### Check for Understanding of Learning Processes

Once you’ve presented instructions for an activity, check to see that participants clearly understand by asking open-ended questions such as:

- ❖ “What questions do you have about the exercise?”
- ❖ “What can I clarify about the activity?”

Learners will feel more comfortable with the process if they are given plenty of opportunity to have their questions and uncertainties dealt with.

### Use Nonverbal Communication

- ❖ Be “a part of your class” by positioning yourself “among” the participants. This means avoid standing behind a lectern; get as close to your learners as possible without invading their personal space, or positioning yourself where some cannot easily make eye contact with you.
- ❖ Use eye contact.
- ❖ Dress appropriately. To be safe, plan to dress at least slightly better than any participant.
- ❖ Use your hands and gestures for animation (be enthusiastic).
- ❖ Use inflection, and much more so than you would conversationally. This is a part of projecting yourself to the audience.

### Use Learning Tools

Be sure to consider some of these useful tools:

- ❖ Flip Charts
- ❖ Overheads
- ❖ Video
- ❖ PowerPoint presentations
- ❖ Models
- ❖ Stories
- ❖ Analogies
- ❖ Personal Examples
- ❖ Wall Charts
- ❖ Pictures
- ❖ Hands-on Experience
- ❖ Role Plays
- ❖ Exercises and “Skill Practice”
- ❖ Energizing Activities



## Adult Learning Process

### Adults:

- ❖ ...must integrate with what is known
- ❖ ...require reinforcement at each step
- ❖ ...require feedback at each step
- ❖ ...must know what is expected of them
- ❖ ...must practice skill without threat



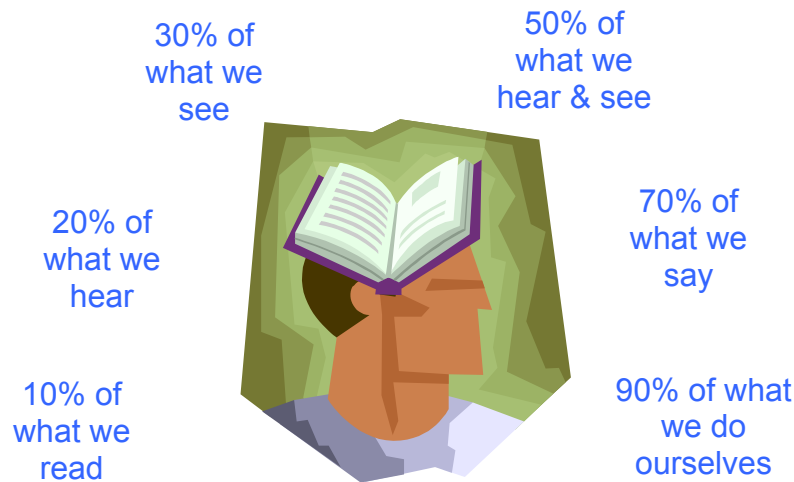
## We Learn

- ❖ 1% through taste
- ❖ 1.5% through touch
- ❖ 3.5% through smell
- ❖ 11% through hearing
- ❖ 83% through sight





### We Absorb or Retain



As a result of the above data, it is obvious that training should be designed to get people taking in information in as many ways as possible. Hearing and seeing a visual is far better than just reading or hearing content. If they can be involved in discussions, and add their own observations, retention escalates. And if they can practice (do) what they've learned, in the learning environment, retention is most likely.

For these reasons, interactive learning is most effective.

### Pike's Laws

Bob Pike, author of the *Creative Training Techniques Handbook* offers a number of “laws of training.” Among them are these:

#### People don't argue with their own data

Facts can be presented, but participants will believe them if they are allowed to discover them. Here are a few examples:

Presented Content	Discovered Content
In an employee orientation, the new employees could be given a list of the locations of photocopy machines that are available for their use, or even be given a floor plan with their locations marked.	But, a far more effective way to teach the locations would be to assign the participants to “go find the two copiers closest to your desk, and tell the instructor how many steps each is away from your desk.”
While teaching a computer software application, the instructor could list, or even demonstrate various ways to save a file.	Or, the trainees could be instructed to experiment with saving files for two minutes and report back with at least two different ways to perform that task. Retention will be far superior with the second method, even though it takes a little more time.
In a class on effective communication, students could find a list of traits of good listeners in their manuals, and be required to read it.	Or, an exercise could be designed that requires them to listen attentively to someone else, and then together brainstorm a list of traits of good listeners based on their experience with the exercise. This type of exercise usually generates at least 80% of the required content. The facilitator can then easily add anything that might be missed.

## Notes

### Learning is directly proportional to the amount of fun you have

Long, dry, boring sessions do not enhance learning. Fun cannot only keep participants awake, it can also dramatically increase the effectiveness of the presentation. Here are some ideas for adding a little fun to the classroom:

- ❖ Use games for learning and review sessions.
- ❖ Use competition between individuals, teams, tables, etc. The competition should be good-natured and everyone should eventually be rewarded.
- ❖ Award candy or trinkets for certain behaviors (good questions, contributions, volunteering, etc.)
- ❖ Award points or cards or some other means of measuring a score for certain behaviors (good questions, contributions, volunteering, etc.), then later present gifts for those with the most “points”. Generally, everyone should receive an equal gift, but those with the most points might get first choice.
- ❖ Use appropriate humor during the presentation with planned jokes or humorous stories. Do this in a style that is natural for you.
- ❖ Add toys or “play items” (play-dough, trinkets, building blocks, etc.) to the learning environment. These are best when they are integrated into the learned content in some way.



### Learning has not taken place until behavior is changed

Anytime a learner can experience and successfully practice the application of the content, application on the job is most likely. Design activities and exercises to offer that experience and practice. Remember that we remember what we *do* far more than what we only *hear* or *see*.

### Create an Interactive Climate

- ❖ *Get them talking from the start*
- ❖ *Find out what they know or can do*
- ❖ *Ask questions... Let them say what they know or feel*
- ❖ *Accept “troublesome,” innovative ideas*
- ❖ *Ask them to teach what they’ve learned*



### Attention Spans

- ❖ *Adults will sit for 90 minutes*
- ❖ *But will retain only 20 minutes of information*
- ❖ *We are conditioned to 8 minute spans of information*



## Preferred Learning Styles

### Learning Purpose

*Why you want to learn something*

- ❖ **Practical**

*Prefers to learn material that relates to what you already know, and want to know how you can use it*

- ❖ **Informative**

*Prefers new and interesting information, whether its practical or not*

- ❖ **Practical/Informative**

*May learn both, depending upon the situation*

### Learning Structure

*How you structure information, how you want it presented*

- ❖ **Specific**

*Prefer information to be presented in a specific, organized, highly structured manner*

- ❖ **General**

*Prefer information to be presented in a very general way, you make your own structure*

- ❖ **Specific/General**

*Your preference for presentation varies*

### Learning Activity

*How active you want the learning process to be*

- ❖ **Participative**

*You like to be actively involved in the learning process*

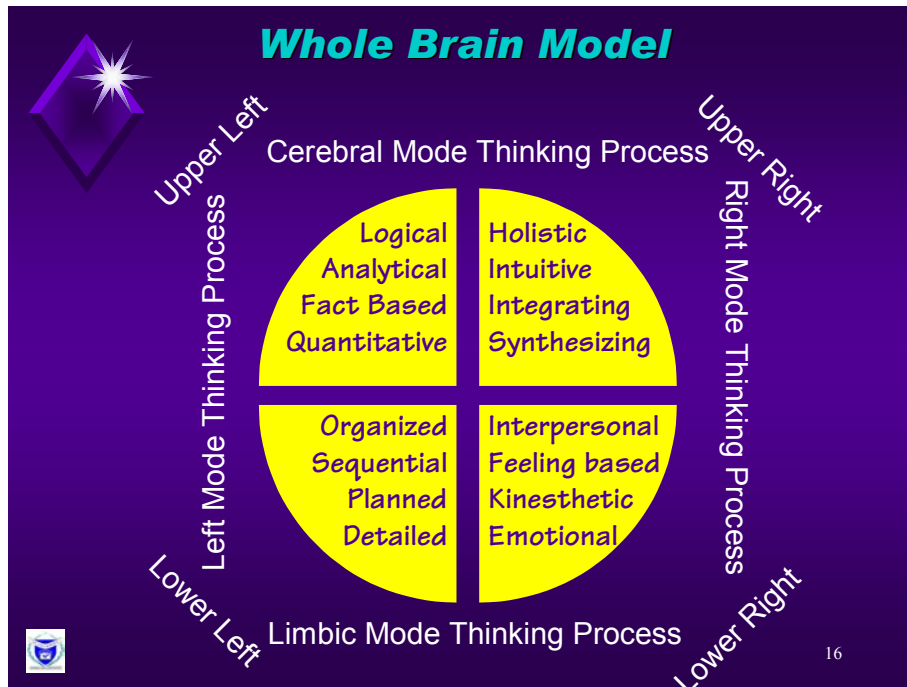
- ❖ **Reflective**

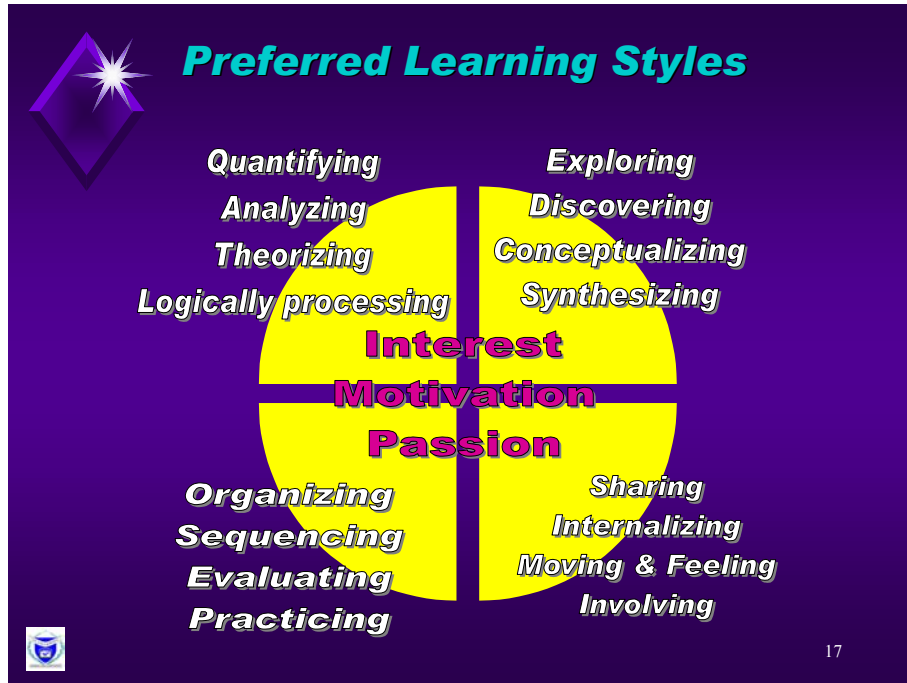
*You like to think about the information you take*

- ❖ **Participative/Reflective**

*Comfortable with both*

## Notes

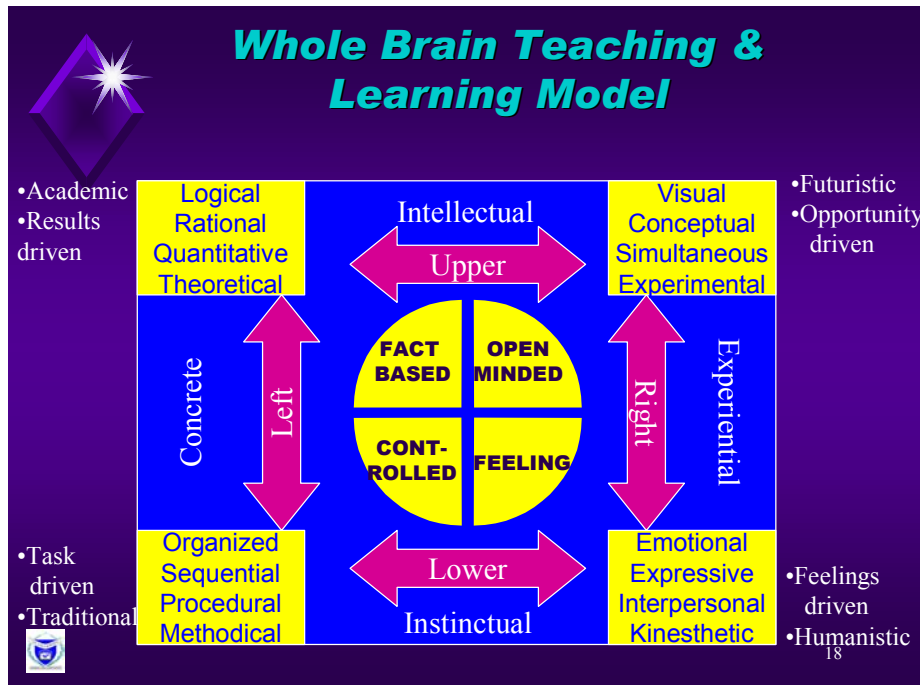




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## Notes





### Instructional Strategies

Thinkers (Upper Left)	Innovators (Upper Right)
<ul style="list-style-type: none"> <li><input type="checkbox"/> Lecture: facts, details</li> <li><input type="checkbox"/> Research findings</li> <li><input type="checkbox"/> Higher order reasoning</li> <li><input type="checkbox"/> Critical thinking</li> <li><input type="checkbox"/> Textbooks, readings</li> <li><input type="checkbox"/> Case studies</li> <li><input type="checkbox"/> Use of experts</li> <li><input type="checkbox"/> Apply logic</li> <li><input type="checkbox"/> Metacognition</li> <li><input type="checkbox"/> Theories</li> <li><input type="checkbox"/> Thinking strategies</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Brainstorming</li> <li><input type="checkbox"/> Mental pictures</li> <li><input type="checkbox"/> Metaphors</li> <li><input type="checkbox"/> Active imagination</li> <li><input type="checkbox"/> Creativity</li> <li><input type="checkbox"/> Illustrations/pictures</li> <li><input type="checkbox"/> Pretending</li> <li><input type="checkbox"/> Mind mapping, synthesis</li> <li><input type="checkbox"/> Holistic exercises (big picture)</li> <li><input type="checkbox"/> Painting/drawing</li> <li><input type="checkbox"/> Patterns/designs</li> </ul>
Organizers (Lower Left)	Humanitarians (Lower Right)
<ul style="list-style-type: none"> <li><input type="checkbox"/> Outlining</li> <li><input type="checkbox"/> Graphic organizer</li> <li><input type="checkbox"/> Checklists, worksheets</li> <li><input type="checkbox"/> Number sequences</li> <li><input type="checkbox"/> Policies, procedures</li> <li><input type="checkbox"/> Organization, summaries</li> <li><input type="checkbox"/> Who, what, why, where, when</li> <li><input type="checkbox"/> Exercises with steps</li> <li><input type="checkbox"/> Problem solving with steps</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cooperative learning</li> <li><input type="checkbox"/> Group discussions</li> <li><input type="checkbox"/> Role playing</li> <li><input type="checkbox"/> Drama/mime</li> <li><input type="checkbox"/> Body language</li> <li><input type="checkbox"/> Sharing personal experiences</li> <li><input type="checkbox"/> Listening and sharing ideas</li> <li><input type="checkbox"/> Storytelling</li> <li><input type="checkbox"/> Musical and rhythmic</li> <li><input type="checkbox"/> Interviews</li> <li><input type="checkbox"/> Physical activities</li> </ul>

## Notes

*“Remember, people have to teach according to the particularities of the people who are learning from them. One must have a very versatile and sophisticated type of mind as a teacher. One can’t use a system or a dogmatic approach as ordinarily understood. Instead, a master teacher has a tremendous range of information about how to put the same thing in different ways. Use them all... All the techniques you know.”*

Indries Shaw



## Empowered Learning

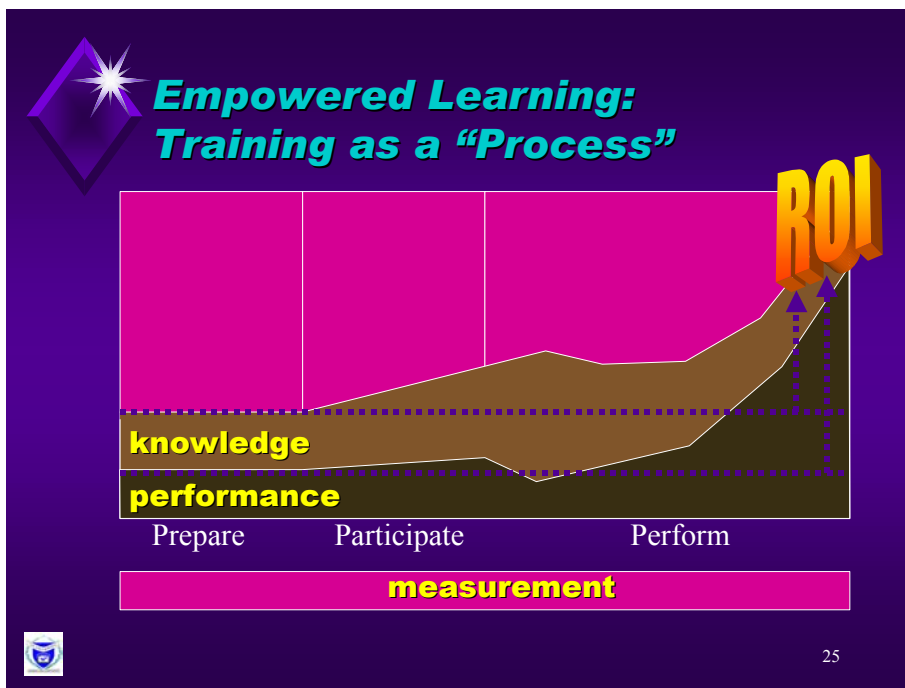
Traditional learning methods rely on the classroom to be the primary learning experience. Training is designed as an *event*.

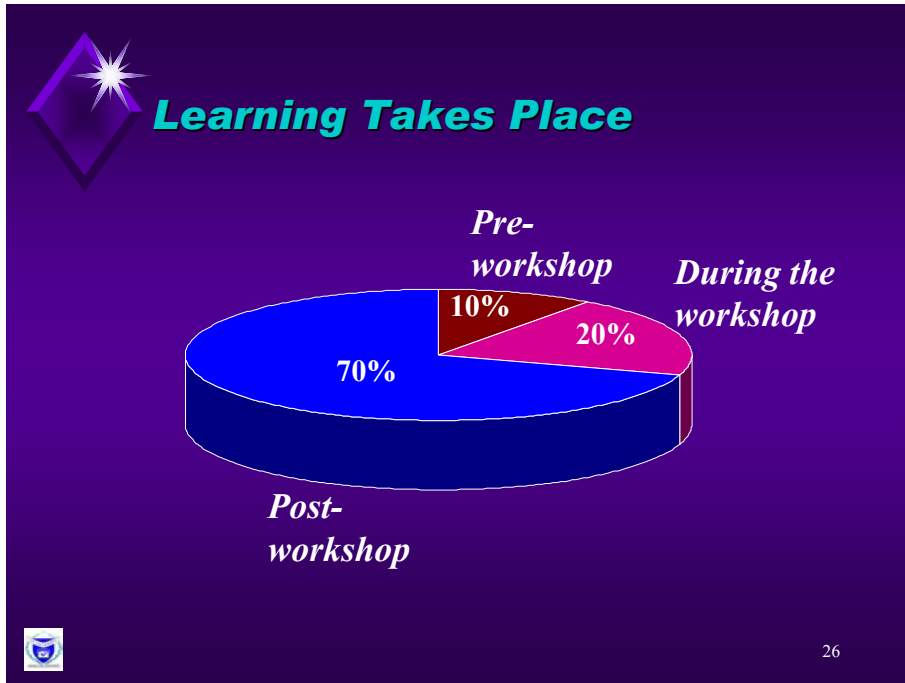


After training, knowledge and performance increase slightly, but then drop to eventually be only slightly above the pre-training level.

## Notes

Designing training as a *process*, which involves a certain amount of pre-training work, as well as a great deal of post-training learning (in the form of application and possibly coaching) can greatly increase the improvement in knowledge and performance.





To take advantage of empowered learning, learning should be designed to take place as shown above. This requires a minimal amount of pre-workshop learning, and a significant amount of post-workshop learning.

Pre-work can be in the form of short readings or a survey or a discussion with one's supervisor. It is difficult to convince learners that they should invest much time in pre-work for two reasons.

- ❖ Learning is traditionally viewed as what should take place in the classroom
- ❖ Many times learners have either little or no desire to participate in the class or have not been informed as to what the class is about and why they are required to attend

Post-work can be in the form of assignments or additional practice. The most effective post-work would be that which is required for one to do their job. See the **Applying content to life** section later in this chapter for suggestions on what the post-work might consist of.

## Tips and Tools for Adult Learning

### Use of small groups

Many participants will be reluctant to ask questions or make contributions during discussions in a large group (even if the group size is relatively small, such as 6 to 8 people). For this reason, occasionally breaking the group into smaller groups of two to five people for short discussions, exercises and activities is a useful strategy. In pairs and smaller groups, more people will be likely to participate and even ask questions.



### Learning teams

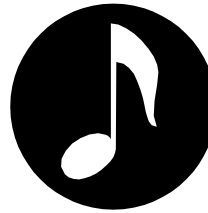
Creation of “learning teams” can greatly add to the effectiveness of certain types of content. Here are a few keys to the use of teams in the classroom:

- ❖ Use the teams for appropriate competition. Team games add a great deal of fun and effectiveness to the learning process.
- ❖ Mix experienced with inexperienced learners. (In some cases, it is better to separate the experience levels, such as presentations that allow individuals or groups to move at their own pace).
- ❖ Make the team accountable for the learning and completion of assignments or activities for all individuals within the team.

### Use of music

Music can enhance the training experience in at least three ways:

- ❖ It can energize the session with the use of upbeat music. Consider playing something upbeat while learners are entering at the beginning of a session, during breaks, and even at the conclusion. The volume of the music can be also be used to indicate the end of breaks and discussions.
- ❖ It can make participants more comfortable in their small group discussions. The use of light instrumental music, softly playing in the background will create a “white noise” that will allow learners to feel as though the room is not completely silent. If they are the first group to begin discussing an activity, they won’t feel as though “the whole room is listening to them.”
- ❖ Reflective music can enhance individual learning. Play this while participants are reading or looking up information. Use “Baroque” music for this kind of learning and retention.



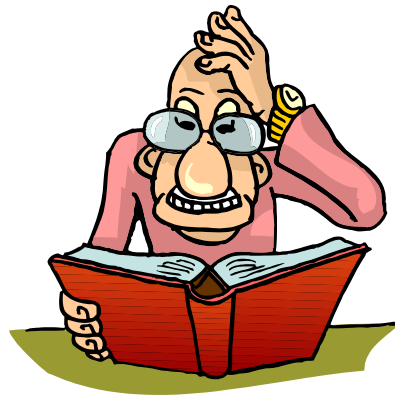
### Applying content to life

Without application to everyday life on the job, training is of no use. Few individuals are able to easily translate learned content into life application.

When the content is somewhat technical or consists of process steps, and is immediately useful on the job, application to life is more easily facilitated. Following are some possible ways to extend the learning to on-the-job application.

- ❖ Require participants to use the learning on their next project or task, and provide evidence of that to the facilitator as a post-training exam. *Example:* for software applications, a document, spreadsheet, or report could be submitted by the learner, and checked by the facilitator. Any errors found can then be used as coaching topics.
- ❖ When possible, ask participants to bring an actual work project to class. Then ask them to complete the project during class time, where they can receive assistance and coaching.

Some topics take much more effort on the part of the learner to apply on-the-job. Core (soft) skills and other topics that are not immediately applicable fall into this category. If the skill won't be used for a period of time (even it's only a matter of a few weeks), it is much more difficult to retain, recall, and apply. This type of material will vary in application from person to person, job to job, and situation to situation.





### Ideas

Some ideas on facilitating application to life for these more difficult subject matters:

- ❖ In small or large groups, **brainstorm** application ideas. Providing a place in the manual for notes on the brainstorming is useful.
- ❖ **Action Learning/Problem Solving** can be used in the classroom to directly apply content. This involves either presenting, or asking the participants to identify a problem that needs to be solved in their work environment. Application of the learning content should then be used to solve the problem. This can be a simple and short discussion, or in more complex cases, an ongoing process that extends beyond the classroom.
- ❖ A course requirement might include that learners **set a goal**, with a deadline, that requires them to employ learned content to accomplish the goal.
- ❖ **Follow-up assignments** can be presented which require application of the course materials. This can be voluntary (with a promised reward) or mandatory.
- ❖ **Daily mini-assignments** for a period of time following the training session can be useful. Again, these can be voluntary (with a promised reward) or mandatory.
- ❖ If the facilitator or another qualified person can be available for **coaching** in the days or weeks that follow the class, a great deal of learning can take place outside of the classroom. This requires participants to fully take advantage of the coach, or for the coach to follow-up with each participant at predetermined intervals.
- ❖ **Learning Agreements** are formal, written documents that outline the learning objectives for a participant. These objectives should be discussed and selected by the learner and his/her supervisor or mentor.
- ❖ **Follow-up discussion groups** can be utilized for the entire class, or interested volunteers. Consider “brown-bag” lunch meetings, where content application ideas and experiences are discussed among the participants.
- ❖ Ideally, a supervisor can hold a learner **accountable for applying the learning**. This involves a great deal of commitment from the supervisor, and his/her ability to review performance and coach as needed.



## Notes

### Examples and stories

Anytime the facilitator can illustrate a concept with an example, or a story, the concept will be much more clear and applicable to participants. The closer the example is to the learner's experiences and job responsibilities, the more effective it will be. A good facilitator will have at least one example or story at hand for most concepts presented. It is even more useful to ask for personal examples from the group.



### Metaphors

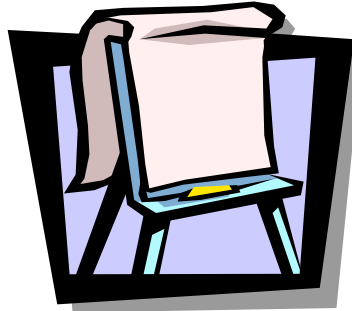
**Met-a-phor** a figure of speech in which one thing is spoken of as if it were another (Ex.: "all the world's a stage")

The use of a metaphor can help many learners grasp a somewhat foreign concept. And if you really want to be sure the participants are "getting" the content, ask *them* to come up with a metaphor for what they've just learned. Not all will be able to, but those who do and share with the rest of the class will deepen the understanding of all.

## Rules for Creating Visuals

### Choose your words carefully

- ❖ Maximum 6 words per line
- ❖ Maximum 6 lines per visual



### Be visual

### Use Color

- ❖ But don't **OVERUSE** color
  - 3 per visual is a good rule of thumb

### Each visual should communicate a single idea

### Use Highlighting

- ❖ Or Revelation

### Use a maximum of 2 fonts

### 6 foot rule!

- ❖ When designing transparencies, if you can read it from 6' away, it will probably be large enough to read as an overhead

## Notes

### Use contrast

- ❖ **Red**
  - Hot
  - Exciting
- ❖ **Blue**
  - Cool
  - Calm
  - Trusting



### Use overlays

- ❖ PowerPoint
- ❖ Flip Charts
- ❖ Transparencies

### Use upper and lower case letters

- ❖ ALL CAPS CAN BE DIFFICULT FOR SOME
- ❖ Upper and Lower Case, with the Right Font is Easier
- ❖ **Sometimes bold is better**
- ❖ Sometimes bold is not better

## Dos and Don'ts

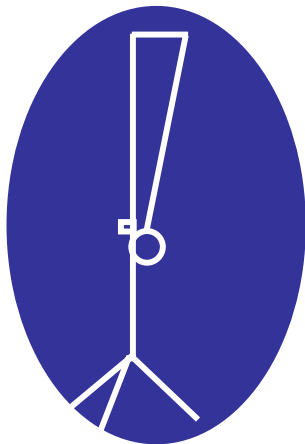
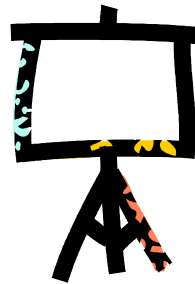
### Do

- ❖ *Stand to the side of visual*
- ❖ *Turn off the projector when not in use*
- ❖ *Use a "frame" to eliminate "light leaks"*
- ❖ *Talk to the audience*
- ❖ *Turn off lights that shine on screen*
- ❖ *Tilt top of screen forward*



### Don't

- ❖ *Walk or stand in front of the visual*
- ❖ *Leave an overhead projector on while talking about something else*
- ❖ *Allow "light leaks" with overhead projectors*
- ❖ *Talk to screen or flip chart*
- ❖ *Turn off all lights (unless necessary)*
- ❖ *Allow keystoneing*



Overhead projection screens can be tilted forward to eliminate "keystoneing"

## Notes