THE **SKILLED TRAINER** SERIES

THE ART OF GREAT TRAINING DELIVERY

STRATEGIES, TOOLS, AND TACTICS

Jean Barbazette

Pfeiffer
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About This Book

Why is this topic important?

How can trainers make training effective, useful, engaging, and interactive? Often novice trainers or subject-matter experts with training responsibilities confuse talking with training and listening with learning. The result can be a boring experience and a waste of time for the learners, since little new learning is retained. This book is the perfect tool to use to easily go beyond the basics of training adults by using the five-step process described here and used with each sample activity.

What can you achieve with this book?

You can learn how to improve a learning experience and enhance retention for your learners. Learners will also get the most learning out of each training activity when selecting a learning method that best suits the type of objective. For example, if you want to influence a learner's attitudes, select a discussion rather than using a lecture. This book also offers a systematic five-step adult learning process you can use to debrief and extend learning for any training method.

How is this book organized?

Each chapter begins with objectives to help trainers identify what new skills and insights can move their training beyond the basics. The tools and checklists in each chapter are also provided in the accompanying CD so that they can be customized and duplicated.

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Pfeiffer serves the professional development and hands-on resource needs of training and human resource practitioners and gives them products to do their jobs better. We deliver proven ideas and solutions from experts in HR development and HR management, and we offer effective and customizable tools to improve workplace performance. From novice to seasoned professional, Pfeiffer is the source you can trust to make yourself and your organization more successful.

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For Edith K Barbazette Galvagna

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INTRODUCTION

Purpose

This book was written to help trainers move their training and facilitation skills to the next level. Beginning and intermediate trainers can learn how to refine their skills when conducting training activities using a variety of methods to get the best learning experience and improve learner retention, learn how to process any learning activity using a five-step adult learning method, and learn to pace learning to improve attention and retention.

Audience

This book is written for the trainer who wants to move beyond basic training skills. Inventories throughout the book help the trainer to assess current skills and preferences and then move training to the next level of skill. Although the main target audience is the "intermediate" trainer, new trainers with little classroom experience can benefit from the tools provided here.

Product Description

Each chapter addresses a training method. Chapter questions are used as section headings to guide the reader through each chapter. A series of assessments is available to sharpen training skills. Tools and checklists are reminders of the skills offered in each chapter. A glossary, bibliography, and index are included.

This book builds on the two previous titles in *The Skilled Trainer Series. The Trainer's Journey to Competence* describes competencies for trainers, instructors, facilitators, coaches, training managers, and training coordinators. *Training Needs Assessment* shows how to assess training needs and create a training plan.

Ideas sourced from others are acknowledged. If an idea, activity, or tool is not sourced, it is the author's creation.

CHAPTER 1

Facilitate the Best Learning Experiences

Chapter Objectives

- To learn how to select the appropriate training method based on the learning objectives
- To learn how to select appropriate technical training methods
- To process adult learning activities using five steps
- To learn how to sequence and pace training methods

Tools

- Best Learning Experiences
- Technical Training Methods to Promote Recall
- Technical Training Methods to Promote Application
- Select the Best Audiovisual Support
- Methods Variety Scale
- DIF: How Much Practice and Training?

Chapter Questions

- What methods can you use to help adults remember what they learned in training?
- What training method creates the best learning experience?
- What are the most effective training techniques for technical training topics?
- What media work best to deliver training?
- How can adults get the most from any learning experience?
- How are training methods paced to maintain attention and improve retention?
- How much practice is needed to learn and retain a new skill?

What Methods Can You Use to Help Adults Remember What They Learned in Training?

For your training to be effective, consider using a variety of training methods that appeal to different learning styles. Most adults learn best when they are actively involved in their learning experiences. When learners discover concepts, rather than listen to them in a lecture or video, retention improves. When a variety of learning methods are logically sequenced, the learners' attention and retention improve. This chapter addresses these issues using tools and examples you can adapt for your training sessions.

What Training Method Creates the Best Learning Experience?

Selecting the best training method is easy when you first identify the learning objective. Remember, learning objectives are written from the learner's point of view. For example, *by the end of this session, the new sales representatives will identify the features and benefits of our new product.* In order to reach this objective, sales representatives will need to remember product knowledge information. The most common training method to impart knowledge is to give a lecture. However, there are several other options that can also meet this objective, such as a demonstration, video, information search, interview, reading printed materials, and tests.

Tool 1.1 identifies the best technique or learning experience to achieve the learning objective. In the table, the name of the training technique is to the left. The middle column describes the technique from the learner's point of view. The right column tells what type of objective is best reached by using this technique. "K" indicates a knowledge objective, for learning facts, theories, or visual identification. "S" indicates an objective that teaches a mental or physical skill and includes analyzing or applying facts, principles, and concepts or performing a perceptual or motor skill. "A" stands for influencing the learner's attitudes, opinions, and motivations. Some techniques are best used to teach only one type of objective. Other techniques can be used effectively to teach more than one type of objective.

Tool 1.1. Best Learning Experiences*

Technique	Description (Written from the learners' perspective)	Best Use K	S	A
Behavior Modeling	See a model or ideal enactment of desired behavior demonstrated by instructor or video	X		
Case Study or Scenario	Analyze and solve a problem, a case situation, or a scenario, alone and/or in a small group	X	X	X
Demonstration	Hear the instructor verbally explain and see the instructor perform a procedure or process	X		
Discussion	Discuss problems or issues, share ideas and opinions in a group		X	X
Field Trip or Observation	Experience or view actual situations for first-hand observation and study	X		
Film, Video, or Skit	View a one-way organized presentation	X		
Games, Exercises, Structured Experiences	Participate in planned activities, then discuss feelings, reactions, and application to real life	X	X	X
In-Basket Exercises	Review typical paperwork to sort, delay, discard, or act on immediately	X	X	X
Information Search	Search for information in source materials alone or in a group	X		
Inquiry-Oriented Discussion	Participate in a discussion during which the facilitator asks planned questions to encourage discovery learning	X		X
Interview	Question a resource person on behalf of the audience	X	X	
Jigsaw Learning or Teaching Learning Team	Concentrate on different information in study groups, where members re-form in groups to teach each other	X	X	X
Learning Tournament	Review material, then compete against other study groups in self-scoring test	X		

*Special thanks to Melissa Smith, Senior Training Clinic Instructor, who helped create this chart.

Tool 1.1. Best Learning Experiences*, Cont'd

Technique	Description (Written from the learners' perspective)	Best Use K	S	A
Lecture	Listen to a one-way presentation of information	X		
Practice or Return Demonstration	Repeat performance of a skill under supervision of instructor, and then again without supervision		X	
Printed Resources	Use charts, posters, laminated job aids, cards, and handouts for reference or as a resource	X		X
Role Playing or Skill Practice	Dramatize a problem or situation, then follow with discussion		X	X
Self-Assessment or Inventory	Examine own values, skills, style, etc., through experiences, surveys, and activities	X		X
Simulations	Experience a situation as nearly real as possible, followed by discussion		X	X
Study Groups	Read material individually, then clarify content in small groups	X		X
Task Force Project	Generate plans in groups that can be used in the actual work situation to solve a real problem	X	X	X
Teaching Project	Teach new information or skills to one another	X	X	
Tests	Answer questions or complete activities that test comprehension, recall, application, etc., of the learning material	X	X	
Writing Tasks	Reflects on own understanding of and response to training, usually descriptive — either planning to use skills or describing an event.	X	X	X

*Special thanks to Melissa Smith, Senior Training Clinic Instructor, who helped create this chart.

To continue with the example of the sales representatives, after learning features and benefits of a new product, additional objectives can develop further learning. For example, *sales representatives will match product benefits to five different types of customers.* Since this objective requires skill application, look for training techniques that have an "X" in the "S" column. The best learning experiences might involve a case study, a small group discussion about different types of customers, and matching benefits to each customer's needs. A role play or simulation of a customer interview will also help meet this objective.

Following are two additional training situations. After you read through each situation and the suggested learning objectives, categorize each learning objective as a knowledge, skill, or attitude objective using Tool 1.1, and then identify at least three training techniques that would help these learners meet their objectives.

Situation One

An experienced cashier, Pamela, has been moved from hardware to children's shoes in a very large department store. From previous training sessions, you remember Pamela as an eager learner who by now is familiar with store policies and cashiering procedures. She is used to dealing with home repair enthusiasts and decorators (adults). Now she must deal with different customers and different merchandise.

Your learning objectives for Pamela's first week in children's shoes are for her to:

1. Learn the new merchandise so she can make appropriate recommendations; and
2. Develop different strategies to deal with children and their parents.

Suggested Answers

The first objective is for Pamela to acquire new knowledge about the new merchandise. Pamela can achieve this objective by observing existing employees, doing an information search to learn how the stock is organized, or reviewing printed resources and catalogs that describe the merchandise. The second objective is a skill based on an attitude of helping children and their parents find the right shoes. Case studies, discussions, and role play or skill practice can help

Pamela reach this objective since each of these methods addresses both skills and attitudes.

Situation Two

You are assigned to train the new Auxiliary volunteers at your hospital. During a previous class for the new volunteers, the only element not "covered" was responding to medical questions and handling sensitive or confidential information. You need to include this information in your next class. Your objectives are to:

1. Distinguish sensitive and confidential information from information that can be discussed openly; and
2. Practice responding to questions about sensitive or confidential information.

Suggested Answers

Distinguishing sensitive and confidential information from information that can be discussed openly is a knowledge objective. If you selected information search, case study, inquiry-oriented discussion, or interview, these techniques are good choices to reach this objective and let the learner discover the information. While giving a brief lecture might reach this objective, it could be the most boring alternative. The second objective requires skill to respond to "medical" questions. Responding to sensitive or confidential information is a skill that is guided by a gentle and caring attitude when speaking to patients or their family members. A combination of case studies, interviews, role plays, and tests can help the volunteers reach this objective.

So far the examples and objectives are about teaching "soft" skills, for which Tool 1.1 is well-suited. Tool 1.1 is also useful in selecting the best learning experiences for teaching technical topics. Tool 1.2 and Tool 1.3 are also helpful for selecting techniques to teach technical topics.

What Are the Most Effective Training Techniques for Technical Training Topics?

Whatever technical information is taught, it can be taught for two purposes, either to *recall* the information or to *apply* the information. The learning objective can tell you whether or not you need to train someone so he or she merely remembers something or knows how to use and apply the information. Tool 1.2 shows five types of information involved in teaching technical topics so employees can recall facts, concepts, processes, procedures, and guidelines.[1] Tool 1.3 shows how to teach technical topics so the employee can use or apply this type of information. Here are some definitions and suggested examples:

Facts are individual statements. For example: What is your password? Or which color of a five-part form goes to the customer? What is the part number for this product? What does error message 51 mean? Who is the vice president of operations? The reason you want the learner to remember this type of information/these facts is usually to do something with the information. The least effective training method is memorization. If knowing factual information is important, make sure participants practice using the facts during the training. This type of training can include "look-up" exercises or practice using job aids.

Concepts are usually stated as a classification or category, or as a general idea. For example, the concept of "preferred customers" implies someone with a good credit history and deserving of special treatment. The reason you want an employee to understand the concept or remember how a concept is defined is to help the employee make a decision or to follow a policy or guideline. Thus, a "preferred" customer may receive preferred delivery, better discounts, special pricing terms, and so forth. Train employees to recognize concepts by using exercises to classify or categorize by matching criteria to a sample situation.

Work processes and procedures are defined as steps to take and why we take them. *Process* focuses on *how* something works. *Procedures* focus on *what steps* are taken. Seventy-five percent or more of technical training involves teaching processes and procedures, for example, how to process a claim, place a telephone order, change engine oil, replace a valve, complete a repair, draw blood, or write a report. You want an employee to recall or use a process or procedure so he or she can complete the process or procedure correctly.

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[1]The five types of information are based on work done by Ruth Clark, described in *Developing Technical Training.* Reading, MA: Addison-Wesley, 1989.

On the recall level, the employee would list the steps and explain why they are taken. That's important during the training process and in high-risk situations. On the use/application level, the employee would do the steps (usually in a return demonstration). For example, during software training, it's easier to teach the content through the process. Often by doing it (following the steps), the learner can "discover" why it is done that way. For this type of training, first, teach the learner the steps to print a report, rather than lecture on how the report will be used and why the steps are done that way. This information can be expanded on later. Many technical processes are concerned with teaching "functionality." Can they do it? You don't have to know how an automobile is made to drive it safely.

Guidelines are policies, common practices, or principles that guide the use of processes and procedures or the application of facts or concepts. For example, who gets credit, which customers pay before pumping their own gas, who is entitled to a refund, which part can be replaced under a warranty, which loans are funded or denied, which returned merchandise is accepted, what merchandise is shipped by surface carrier or air. The reason you want employees to be able to state criteria or guidelines is usually because they will have to explain the criteria or guidelines to a customer. On the use/application level, employees must be able to apply guidelines/criteria to individual situations. The best methods to teach employees to recall and apply principles are to provide situations, case studies, or examples and to ask the learners to make the decisions.

What Media Work Best to Deliver Training?

Use the table in Tool 1.4 to identify the best audiovisual support to achieve the learning objective. "K" stands for a knowledge objective, for learning facts, theories, or visual identification. "S" stands for an objective that teaches mental or physical skill and includes analyzing or applying facts, principles, and concepts or performing a perceptual or motor skill. "A" stands for influencing attitudes, opinions, and motivations of learners. Some support media are best used to teach only one type of objective. Other media can be used effectively to teach more than one type of objective.

Tool 1.2. Technical Training Methods to Promote Recall*

	Objective Is Recall	Training Methods
Facts Unique, literal information Ex: PIN number, date, part number	Remember Identify	Job aid, online help Memorization Mnemonic cues
Concepts A classification or category of things with shared features, a mental image, a general idea, elements of a class Ex: computer, car, good credit, empathy, who is eligible for a refund	State the definition State the criteria List the guidelines	Analogies Define Give examples Demonstration Answer questions
Procedures Steps to take Ex: Put gas in a car; connect to the intranet, how to draw blood	List the steps Tell how to do the task	Memorize steps Tell sequence of steps
Processes Why steps are taken Ex: How to store a cell telephone number; the process for ordering office supplies, how blood circulates	Explain why steps are taken Describe how a process works	Describe Answer questions
Guidelines Policies, common practices, or principles that guide the use of processes and procedures or the application of facts and concept Ex: Create the next part number in a sequence	State the guideline	Job aid Look-up exercise

*Special thanks to Linda Ernst, Senior Training Clinic Instructor, who contributed to the creation of this table.

Tool 1.3. Technical Training Methods to Promote Application*

	Objective Is Use/Application	Training Methods
Facts Unique, literal information Ex: PIN number, date, part number	Explain Use as part of a procedure, process, concept, or principle	Practice
Concepts A classification or category of things with shared features, a mental image, a general idea, elements of a class Ex: computer, car, good credit, empathy, who is eligible for a refund	Classify examples Categorize examples Apply a concept or policy Match criteria to a situation	Discrimination exercises to identify non-examples Classification activities
Procedures Steps to take Ex: Put gas in a car; connect to the intranet	Do the steps	Sequence steps Demonstrate use Practice
Processes Why steps are taken Ex: How to store a cell telephone number; the process for ordering office supplies	Solve a problem Relate cause and effect	Practice decisions Simulations Troubleshooting exercises Read flow charts Case studies
Guidelines Policies, common practices, or principles that guide the use of processes and procedures or the application of facts and concepts Ex: Create the next part number in a sequence	Apply the guideline Make a decision	Case study Role play Discrimination exercise Practice decisions

*Special thanks to Linda Ernst, Senior Training Clinic Instructor, who contributed to the creation of this table.

Tool 1.4. Select the Best Audiovisual Support*

Audiovisual Instructional Medium	Best Use		
	K	S	A
Audio recording	X	X	
Cartoons			X
Drawings and illustrations	X	X	
Exhibits	X		
Flip charts, whiteboards, and chalkboards	X		
Models and mock-ups	X	X	
Music			X
Overhead projection, electronic slides	X		
Photos	X		
Printed material	X	X	
Real objects	X	X	
Simulators	X	X	
Toys			X
Video, film, and TV	X	X	X

*Special thanks to Melissa Smith, Senior Training Clinic Instructor, who helped create this table.

How Can Adults Get the Most from Any Learning Experience?

Many trainers are familiar with an experiential learning model that takes learners through a series of steps to process a learning activity such as a simulation. This type of debriefing discussion is helpful and appropriate for any type of learning activity. Here is a general description of what takes place during the five steps of adult learning.[2] The successful trainer or facilitator guides adult learners through these five steps to gain the most from any learning activity used to achieve the learning objective. These five steps are similar to many experiential learning models.

1. Trainer Sets Up the Learning Activity by Telling What, Why, and How

Set up the learning activity so the participants understand *what* they are going to do (for example, read a case study and individually prepare answers for a discussion) and why they are doing it (learn about how to give a performance review). Adult learners become motivated when they understand the benefit to them of learning something new or the importance of the objective for themselves. To understand *how* the objective will be met, give directions and ground rules regarding how the learning activity is to be conducted. The set-up of a learning activity can include such things as:

- Tell participants the purpose of the learning activity and why they are going to learn from the activity without giving away what is to be "discovered."
- Explain what the participants are going to do.
- Review the written directions and answer questions about the activity.
- Divide participants into small groups or explain the amount of time to prepare individually for a group activity.

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[2]Adapted from *Instant Case Studies* by Jean Barbazette © 2001. San Francisco: Pfeiffer. Used with permission.

- Assign small group roles such as recorder, reporter, or small group discussion leader.
- Give other ground rules.

2. Learners Participate in a Learning Activity

For a learning activity to be successful, involve learners as much as possible. Consider how learning from a learning activity will appeal to different learning styles. This step might include individual reading of a case study, reading background information for a simulation, or other preparation, such as following the written directions given at the beginning of the activity or reading questions to be answered as the class watches a video or, following the learners' discussion, asking a reporter from each small group to share each group's answers.

3. Learners Share and Interpret Their Reactions

This step is essential to help conclude the small group discussions and gives learners the opportunity to identify what happened in different small groups. Ask the group additional questions to help learners analyze the discussion and then develop individual and group reactions to the activity. Have learners share their reactions by identifying what happened to them and to others and ways in which their behavior affected others during the small group discussion. Sample facilitator processing questions include:

- "What made it easy or difficult to find a solution to this problem?"
- "What helped or hindered the progress of the discussion?"
- "Let's summarize the key points from the case study."

Sometimes, it is appropriate to have participants write down their reactions to the learning activity so that others do not influence their thinking before they share reactions to a learning activity. In this way, the reactions come from the learners, not from the facilitator.

Sharing reactions is the beginning step of reaching a conclusion. If participants do not take this step, it is difficult to end the activity and move on, as there may be unfinished business that spills over into later activities.

4. Learners Identify Concepts

This is the "So what did I learn from the activity?" step. If this step is left out, then learning will be incomplete. Up to this point, participants have been actively learning from a specific situation, and they may not be able to generalize their learning to similar situations outside the classroom. Questions that help learners develop concepts, include:

- "What did you learn about how to conduct an interview, discipline a subordinate, teach a new job, etc., from this learning activity?"
- "What is appropriate behavior for a new supervisor?"

When concepts are fleshed out from a discussion of the learning activity, adult learners are ready to apply these concepts to future situations. Ask questions to elicit concepts from the learners, rather than tell them the concepts they should have found.

5. Learners Apply Concepts to Their Own Situations

This is the "So what now?" step in the adult learning process. Ask participants how they can use and apply the new information they have learned. Ask questions such as:

- "How will you use this skill the next time a subordinate asks you for a favor?"
- "What are some situations in which you would be more effective if you used this technique?"

If this step is left out, learners may not see the relationship between the learning activity and their own jobs or situations. This step stresses practical application and helps learners find the personal benefits from the learning activity.

To effectively facilitate a case study discussion, ask the learners questions about the learning activity, rather than suggesting applications. Following are some facilitator processing questions to elicit discovery learning using Steps 3, 4, and 5.

Facilitator Processing Questions[3]

Questions for Step 3: Learners Share and Interpret Their Reactions

- What happened when you tried out that function/step as part of the case?
- What surprised you?
- What part was easy? Difficult? What made it easy? Difficult?
- What did you notice/observe? How was that significant?
- How was that positive/negative?
- What struck you most about that?
- How do these pieces fit together?

Questions for Step 4: Learners Identify Concepts

- How does this relate to other parts of the process?
- What might we conclude from that?
- What did you learn/relearn?
- What processes/steps are similar to this one?
- What else is this step/process like?
- What does that suggest to you about __________ in general?
- What's important to remember about this step/function?
- What other options/ways do you have for completing this step/function?
- How can you integrate this step into the larger process?
- What other functions are impacted by this step?

Questions for Step 5: Learners Apply Concepts to Their Own Situations

- How can you use what you have learned?
- What is the value of this step/function?

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[3]Adapted from J. William Pfeiffer, *UA Training Technologies 7: Presentation & Evaluation Skills in Human Resource Development*, pages 66–68. Used with permission of Pfeiffer.

- What would be the consequence of doing/not doing this step?
- How does what you have learned fit with your experience?

After considering how to process an adult learning activity using the five steps above, next consider how to pace a variety of training activities for maximum attention and retention.

How Are Training Methods Paced to Maintain Attention and Improve Retention?

Tool 1.5 is the Methods Variety Scale, which is used to vary the pace of training methods to extend the attention span of learners. The scale is based on the assumption that most adults have an attention span of about fifteen minutes. A recent study[4] ties attention disorders to the number of hours a preschool child watches television. If learners born after 1960 have watched an average 4+[5] hours a day of television, could their attention span be closer to seven minutes, since that is the programming time between commercial messages? Could learners raised in the United Kingdom watching the British Broadcasting Corporation (BBC) have an attention span closer to twenty minutes, since that is the typical length of programming? Here is a tool to help capture and extend the learners' attention. Here's how to read the scale.

The vertical axis shows what the learner does on a scale of 0 to 10. 0 is a low level of activity and requires little interaction with others. Most of the terms are self-evident; however, the difference between a lecture and a participative lecture is that in the latter the learners answer a few questions in the large group during a participative lecture, which increases learner involvement. A *return demonstration* is also called "practice" and usually follows a demonstration by the trainer (which is the same rating as watching a lecture or a film/video). A *structured experience* is also sometimes called a simulation.

The horizontal axis of the Methods Variety Scale is divided into hours by solid lines and dotted lines for every fifteen-minute portion of class time. Plot

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[4]Dr. Dimitri Christakis, "Early Television Exposure and Subsequent Attentional Problems in Children." *Pediatrics, 113*(4), April 2004.

[5]Wendy Josephson. "How Children Process Television," Issue Brief Series. Studio City, CA: Mediascope Press, 1997.

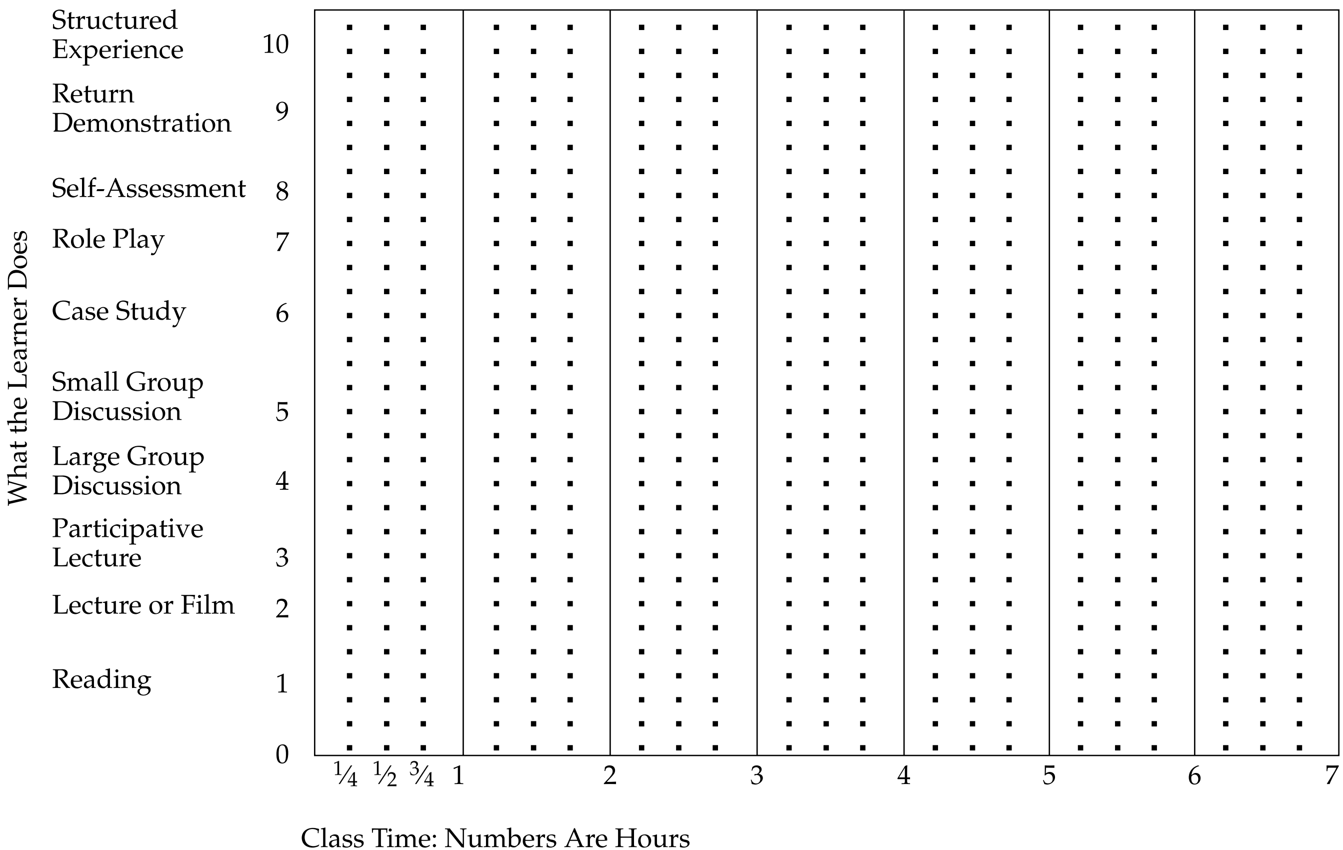
the level of learner participation during the session and check whether you have changed the pace at least every fifteen minutes. Also, check to be sure that the learners' level of activity is at least over the level of "5" once an hour or more. If you do not do these two things, then learner attention and retention can still be brought higher by increasing the variety of learning activities as well as bringing the level of participation over "5" at least once an hour. For full-day workshops, try getting the level of participation over "5" at least twice an hour after lunch, when some participants would prefer to take a nap.

Many software training sessions enhance retention by using this scale. In particular, the developers limit themselves to demonstration (level 2) and a return demonstration (level 9). When using software training, you can improve on this by using learner practice and two or three return demonstrations afterward. Instead of using only the first two steps in the five steps of the adult learning model, try having large-group or small-group instruction for the learners to share and interpret their reactions to what they have been practicing. Then ask them the concept they have discovered while practicing with the software, and finally ask them how they can apply what they have learned in their own work. Breaking up practice sessions by using a variety of methods can avoid overloading participants with too much information in a compressed period of time.

Tool 1.5 is a copy of the Methods Variety Scale for you to use to check the pace of learning activities so attention and retention can improve.

Instructions: Plot each learner's level of participation. Does activity vary every fifteen minutes? Is the learner's participation over the level of 5 at least once an hour?

Tool 1.5. Methods Variety Scale



How Much Practice Is Needed to Retain a New Skill?[6]

The purpose of the decision tree analysis in Tool 1.6 is for you to decide how much training and practice is appropriate for participants to learn a new task, based on the task's difficulty, importance, and frequency with which the task will be regularly done.

Of course, it is more *difficult* to learn how to do a task than to do a task once learned. "Difficulty" in this context refers to once the task is learned, not the difficulty of learning it. Some factors that make a task difficult to do once it is learned include complexity, the number of steps, the requirement to complete steps in a specific sequence, degree of physical dexterity needed, the requirement for uniform performance of the task, environmental factors, degree of physical or professional risk, and the length of time to complete the task. Also consider the difficulty for the typical performer. Assess the level of difficulty of learning the task from one learner's point of view. Remember also that an individual's attitude toward doing the task successfully can make the task seem harder.

Tasks have relative i*mportance* to managers, supervisors, and employees. Perceived importance and organizational importance of doing a task in a standard manner are both worth considering. To what degree will the task outcome change based on irregular performance? Are there consequences for poor performance? Ask whether or not it is important to do this task in a prescribed, standard manner.

Will the task be repeated *frequently* enough so the employee will not forget how to do the task once learned, or is lots of practice necessary to build initial and permanent retention?

Once you have identified the *difficulty, importance,* and *frequency* of a task, use Tool 1.6 to decide how much training is usually sufficient to learn and retain it and what type of reinforcement is appropriate. A few examples are given below, with a rationale for each recommendation.

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[6]Based on a tool from Army School of Instructional Technology, UK Royal Army Education Corps, Pamphlet No. 2, "Job Analysis for Training?" Army Code No. 70670.

If a participant is to learn to do cardiopulmonary resuscitation (CPR), the task is very difficult, since CPR is performed under "life and death" circumstances, and it is physically demanding to do for more than a few minutes. CPR must be performed in a standardized manner and is infrequently performed even by healthcare practitioners in hospital emergency rooms. The recommendation is to provide *advanced training,* which means that learners must be trained to a high standard of retention, accomplished by reinforcement training, resources, references, or job aids. This explains why CPR certification must be renewed annually and why learners are given a job aid to carry with them as a reminder of the process learned in class.

An example of a task learned by most new employees during orientation to a new job is to complete a time card or account for their hours worked on a daily or weekly basis. Most systems (punch cards, software programs) are not difficult to complete. It is important to complete the task in a standardized manner, since most systems only accept data in a predetermined manner. This task will be completed very frequently (daily or weekly). The recommendation is to use demonstration because formal training is not required, and the skill can be acquired on the job through practice. There is also the added motivation to report hours correctly to receive one's paycheck on time.

A final example is to create a script or lesson plan from a PowerPoint® show. For many people, it is a moderately difficult task to perform. This task includes modifying the slides after they are imported into a Word® document. To correctly export the slides, a standardized process is followed. If the learners will use this feature of PowerPoint frequently, basic training is recommended. That will ensure that the learners can demonstrate proficiency in performing this task at an achievement level required on the job. Notice that if this task is to be only moderately or infrequently performed, advanced training is recommended. That may mean providing a job aid as a reminder of the steps in this process.

Here are twenty adult learning principles to guide your facilitation of the best learning experiences. Each of these principles has implications for different types of training and will be referred to during the remaining chapters of this book.

Tool 1.6. DIF: How Much Practice and Training?

How difficult is the task to do?	Important that task be done in standardized manner?	How frequently will task be repeated?	
Very ⇒	Yes ⇒	Very ⇒	Basic
		Moderate ⇒	Advanced
		Infrequent ⇒	Advanced
	No ⇒	Very ⇒	Basic
		Moderate ⇒	Basic
		Infrequent ⇒	Demonstrate
Moderate ⇒	Yes ⇒	Very ⇒	Basic
		Moderate ⇒	Advanced
		Infrequent ⇒	Advanced
	No ⇒	Very ⇒	Demonstrate
		Moderate ⇒	Demonstrate
		Infrequent ⇒	Demonstrate
Not ⇒	Yes ⇒	Very ⇒	Demonstrate
		Moderate ⇒	Demonstrate
		Infrequent ⇒	Basic
	No ⇒	Very ⇒	Demonstrate
		Moderate ⇒	Demonstrate
		Infrequent ⇒	Demonstrate

DIF Practice Recommendation

Difficulty—Importance—Frequency

Demonstrate: Formal training not required. Skills can be acquired on the job through practice after a demonstration.

Basic Training: Learner must be able to demonstrate proficiency in performing task at achievement level required on the job.

Advanced Training: Learner must be trained to a high standard of retention. Accomplished by reinforcement training, resources, references or job aids.

Adult Learning Principles

Adult Motivation and Retention

1. Adults prefer to determine their *own* learning experiences.
2. Adults are motivated to learn when *THEY* identify they have a need to learn.
3. Adults are motivated by *societal or professional pressures* that require a particular learning need.
4. Adults can be motivated to learn when the *benefits* of a learning experience outweigh their resistance.
5. Adults use their knowledge from years of experience as a filter for new information and *don't change readily.*
6. Adults learn best from their own *experiences.*
7. An adult's experience is a filter that can function as a *catalyst or barrier* to learning something new.
8. Ninety percent of what adults learn and retain in long-term memory is tied to previous knowledge (Velcro learning[7]).
9. Adults like tangible *rewards and benefits* from training.
10. Adults retain learning that they *discover* and forget much of what they are told.

Adult Methods of Training

11. Some adults like some lectures. All lectures won't be liked by all adults.
12. Adults like *small group discussion* and a variety of interaction with the instructor and other participants.
13. Adults enjoy *practical* problem solving. Adults want *practical* answers for today's problems.

[7]Ron Zemke, former editor for *Training* magazine, coined this term.

14. Practice is a part of the learning process, not the result of it.
15. *Assess* the learners' interest in your topic; don't assume interest.

Adult Learning Environment for the Physical and Virtual Classroom

16. Adults hate to have their *time* wasted.
17. Adults like physical comfort.
18. Adults appreciate breaks, which convey *respect* to the learner.
19. Adults expect *assistance* with technical problems.
20. Adults become bored and will *multi-task* when participation isn't interesting or required.

Before deciding among many of the training methods defined in this chapter, first look at your own preferred training style by taking one of the three versions of the Trainer Style Inventory in the next chapter.

CHAPTER 2

How Effective Is Your Training Style?

Chapter Objectives

- To identify your training style and your personal preference for the styles
- To learn how the four training styles relate to the five adult learning steps
- To identify the advantages and disadvantages of each style
- To create an action plan to enhance your training style

Tool

- Trainer Style Inventory

Chapter Questions

- How can you learn about your preferred trainer style?
- How do you interpret your scores?
- How are training styles related to adult learning?
- What are the advantages and disadvantages of each style?
- How can you enhance your training style?

How Can You Learn About Your Preferred Trainer Style?

The Trainer Style Inventory was first developed in 1996. A second version was created in 2000 for technical trainers and a third version in 2002 for e-facilitators. The Trainer Style Inventory in this chapter is a combination of all three previous versions and will assist you in identifying the effectiveness of your current instructional style when training adults. You can be most effective when you help adult learners progress through the five sequential steps in the adult learning process described in Chapter 1. Trainers must use different skills at each step of the adult learning process. The Trainer Style Inventory (Tool 2.1) measures your preferences for using all of these skills and summarizes the results in four styles.

After you have identified your style preferences and learned the advantages of using a preferred style and the disadvantages of overusing or under-using a style, you are encouraged to create a developmental plan to increase your style balance.

Some other inventories that are useful for trainers include the Trainer Type Inventory (TTI) by Mardy Wheeler and Jeanie Marshall (Pfeiffer, 1986) and Training Style Inventory by Richard Brostrom (Pfeiffer, 1979). The Brostrom inventory clarifies a trainer's orientation as humanist, behaviorist, functionalist, or structuralist. It does not link trainer orientation to adult learning steps. The TTI links a trainer's type to the experiential learning cycle (Pfeiffer & Jones, 1980) and to Kolb's Learning Style Inventory (McBer, 1976). I believe that not all adult learning is a cycle; rather adult learning occurs in sequential steps.

Trainers, classroom instructors, adult educators, and those who conduct on-the-job training and facilitate e-learning can all use the Trainer Style Inventory to identify style preference(s) and range of styles. Since a different style is best used with each of the five adult learning steps, being able to use a range of all four styles is the ideal. You are encouraged to consider when to use each style appropriately, the advantages of your dominant style, and the disadvantages of the overuse of your preferred style and the disadvantages of not using your least preferred style. Inventory results can also be used to facilitate a personal development plan to gain greater comfort with each of the four different styles. *See the advantages and disadvantages discussion following the scoring of the inventory.*

Tool 2.1. Trainer Style Inventory*

Directions: For each of the twelve sets of items, rank your preferred training approach or method from 1 to 4 in each set. A ranking of 1 is your **most preferred or most often used approach**, 2 is your next preferred approach or method, and 4 is your **least preferred or least used method** or training activity. If you are having a difficult time deciding, rate the type of activity you **like** best as number 1. If you use a combination of activities, rank the activity used most as number 1.

1. For most of the content you teach, do you . . .
   a. ____ use small group discussion
   b. ____ give a lecture and/or demonstration
   c. ____ provide self-paced reading material, online tutorial, or CBT
   d. ____ combine a lecture with large group discussion

2. To teach a procedure or process, do you most often . . .
   a. ____ conduct a demonstration
   b. ____ use exercises or a problem-solving activity to teach a point
   c. ____ assist or coach a learner one-on-one
   d. ____ encourage learners to post a question or talk about the procedure/process and ask questions as they watch you

3. To introduce new technical material, do you . . .
   a. ____ be or provide a subject-matter expert to explain the material or the idea
   b. ____ guide or supervise learners as they practice the skill
   c. ____ use tools or a symbolic demonstration to present the material
   d. ____ give verbal and written directions to complete a task

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*Two different versions of the Trainer Style Inventory were published as part of the *McGraw-Hill Training and Performance Sourcebook,* in 1996 and 2000. Used with permission of McGraw-Hill.

Tool 2.1. Trainer Style Inventory*, Cont'd.

4. When are questions appropriate in the material you teach?
   a. ____ randomly, while you conduct a structured demonstration
   b. ____ at any time during training learners can ask questions or discuss the material with the instructor or with each other
   c. ____ at the end of the session
   d. ____ after structured "quiet" time to reflect and generate questions as part of the learning process

5. How is learning best evaluated for subjects you teach? You . . .
   a. ____ ask learners to assess their progress with polls and quizzes and obtain feedback as needed
   b. ____ measure learning against learning objectives using a test or skill practice
   c. ____ measure learning against expert criteria
   d. ____ help learners evaluate their own progress and how they will apply what is learned

6. As a trainer, would you rather . . .
   a. ____ be recognized as a practical role model on the subject
   b. ____ have an academic reputation or be a published author on a subject
   c. ____ be seen as a skilled advisor offering specific tactics to apply learning
   d. ____ be seen as a coach, peer, or friend to help the learner grow and develop

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Tool 2.1. Trainer Style Inventory*, Cont'd.

7. How do you see your role as a facilitator?
   a. ____ help learners develop an understanding or theory of how a process works
   b. ____ teach useful skills
   c. ____ help learners apply what is learned to their situations
   d. ____ instruct learners on new ways of doing things

8. As part of the learning process, what do you do most often?
   a. ____ offer your observations and suggestions to learners
   b. ____ listen to learner's' concerns
   c. ____ direct the learning experience
   d. ____ help learners understand the concepts behind the specific information being provided

9. How do you see your primary function as a facilitator?
   a. ____ see that everyone is involved
   b. ____ explain how something works
   c. ____ help learners determine causes through reasoning
   d. ____ facilitate activities to help learners discover how to apply what's learned

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Tool 2.1. Trainer Style Inventory*, Cont'd.

10. What is your most valuable function when facilitating?

    a. ____ help learners share and interpret reactions from a learning activity

    b. ____ extract general concepts from specific information or activities

    c. ____ direct a learning activity so learning outcomes are assured

    d. ____ encourage learners to plan and verbalize how new learning will be used

11. What is the learner's role in the learning process? To . . .

    a. ____ state his or her understanding of an idea, technique, or process based on objective criteria

    b. ____ develop tactics to apply new learning

    c. ____ discover what is learned through training activities

    d. ____ evaluate learning based on results

12. How do you view the learning process?

    a. ____ learning occurs when learners have adequate resources and problem-solving skills

    b. ____ learning is a shared responsibility between the facilitator and the learners

    c. ____ the trainer is responsible to make sure learning takes place

    d. ____ learning occurs when a trainer provides a strong theoretical, factual base for an independent thinking learner

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Tool 2.1. Trainer Style Inventory*, Cont'd.

Scoring the Training Style Inventory

Directions: Record the points from each line in the correct column. Total the number of points in each column. Each column represents a style.

	Instructor	Explorer	Thinker	Guide
	1b ____	1a ____	1c ____	1d ____
	2a ____	2d ____	2b ____	2c ____
	3d ____	3c ____	3a ____	3b ____
	4c ____	4b ____	4d ____	4a ____
	5b ____	5a ____	5c ____	5d ____
	6a ____	6d ____	6b ____	6c ____
	7d ____	7c ____	7a ____	7b ____
	8c ____	8b ____	8d ____	8a ____
	9b ____	9a ____	9c ____	9d ____
	10c ____	10a ____	10b ____	10d ____
	11d ____	11c ____	11a ____	11b ____
	12c ____	12b ____	12d ____	12a ____
totals	________	________	________	________

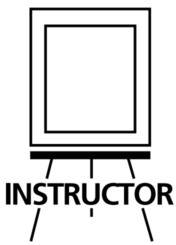
If the total of all four columns doesn't add up to 120, check your math.

*Two different versions of the Trainer Style Inventory were published as part of the *McGraw-Hill Training and Performance Sourcebook,* in 1996 and 2000. Used with permission of McGraw-Hill.

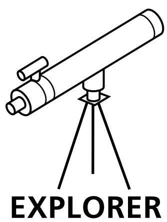
How Do You Interpret Your Scores?

The score with the *lowest* number is your *most preferred* or most often used style. This style is a comfortable way for you to train. The *highest* score is your *least used/preferred* style, and you probably do not use it often. A difference of more than 8 points between the highest and lowest scores indicates lack of flexibility in using your least preferred style. When all four scores are within 4 points of each other, it indicates flexibility in using different styles. Tied scores mean you have equal comfort in using those styles. A description of the four trainer styles follows.

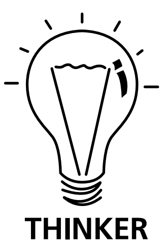
How Are Training Styles Related to Adult Learning?



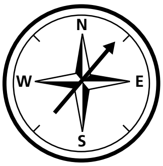
The *Instructor* enjoys setting up and directing the learning activity (steps 1 and 2 in the Adult Learning Steps). The Instructor is most comfortable giving directions and taking charge of the learning activity. The Instructor prefers to tell the learners what to do, is well-organized, self-confident, and concentrates on one item at a time. He or she provides examples, controls learner participation, and uses lecture effectively.



The *Explorer* is most comfortable helping learners share and interpret their reactions to a learning activity (step 3 in the Adult Learning Steps). The Explorer is a good listener who creates an open learning environment, encourages free expression, and assures that everyone is involved in the discussion. He or she is alert to nonverbal cues and shows empathy for the feelings and emotions of the learners. The Explorer appears relaxed and unhurried and is accepting of the learners' reactions and encourages self-directed learning.



The *Thinker* is most comfortable helping the learner generalize concepts from the reactions to a learning experience (step 4 in the Adult Learning Steps). The Thinker helps learners categorize, organize, and integrate their reactions into theories, principles, and generalizations. He or she focuses on ideas and thoughts rather than on feelings and emotions. The Thinker acknowledges different interpretations and theories. Independent thinking is encouraged based on objective information. The Thinker assists learners in making connections between the past and the present. The Thinker is often a practiced observer of the learning activity.



GUIDE

The *Guide* is most comfortable helping learners apply how to use new learning in their own situations (step 5 of the Adult Learning Steps). The Guide prefers to involve trainees in activities, problem solving, and discussions and helps them evaluate their own progress. Experimentation with practical applications is encouraged. The Guide encourages trainees to draw on each other and on the trainer as resources. The Guide acts as a facilitator to translate theory into practical action. He or she focuses on meaningful and applicable solutions to real-life problems. The Guide encourages active participation.

What Are the Advantages and Disadvantages of Each Style?

Below are suggestions for when to use each style and some of the advantages and disadvantages of each style. Generally, it is a disadvantage to overuse any one of the styles or to underuse one of the styles.

Instructor

When to Use: The Instructor style is best used to complete adult learning steps 1 and 2: set-up and conduct the learning activity.

Advantages: Many technical trainers and subject-matter experts are most comfortable when using the "instructor" style. They are quite comfortable in their expertise and easily and willingly offer their knowledge and experience to the learner. Many adults learn information presented in a clear and concise manner by an expert instructor. Instructors provide clear directions and ground rules. They tell learners what they are going to learn and the benefits of learning that information and structure the learning to meet the objective.

Disadvantages (overusing): If the Instructor ignores the experience of the learners or spends too much effort controlling the learning situation, adults could be discouraged from participating. Many adults do not learn well by just listening to an expert.

Disadvantages (underusing): The trainer who does not like to use the Instructor style may have difficulty controlling the class. Underusing this style can result in giving unclear directions for an activity or in setting ambiguous ground rules. When participants are unsure, they sometimes need firm direction in order for learning to take place. A brief lecture often helps provide a firm foundation for later learning activities, especially when the adult learners have no experience in the subject being learned.

Explorer

When to Use: The Explorer style is best used to complete adult learning step 3: share and interpret reactions.

Advantages: Most trainers with good interpersonal skills feel comfortable using the Explorer style. Adult learners seem to flourish when given the opportunity to express their own opinions and give their own reactions. They feel valued when their experiences are validated. This style helps to maintain a positive learning climate.

Disadvantages (overusing): Not all participants are interested in sharing their feelings or reactions to a learning experience. Some participants can easily move through this step with little assistance and only a brief recognition of what took place during a learning activity. Overuse of this style can be seen as intrusive by the participants and may result in frustrating the learner who seeks a faster pace.

Disadvantages (underusing): Unless participants have a chance to reflect on what happened during the learning activity, it will be difficult for you to determine what larger concepts could be learned. Ignoring this step or telling the participants what happened or was supposed to happen in the learning activity usually results in frustration for the adult learner. Learning takes place for the adults when they can reflect on their own experiences.

Thinker

When to Use: The Thinker style is best used to complete adult learning step 4: identify concepts from learner reactions.

Advantages: Abstract thinkers are most comfortable with the trainer who uses the Thinker style. A discussion of ideas is great fun and mental exercise for some adult learners. Adults also like having their personal experiences and reflections elevated to concepts.

Disadvantages (overusing): Those learners who are not comfortable with abstract ideas sometimes have difficulty with this style of training. The concrete or practical learner can become impatient and want to move more quickly to find out how these ideas can be used.

Disadvantages (underusing): Those learners who are not exposed to taking individual, concrete experiences and translating them into generalizations or concepts usually have difficulty applying new experiences to their own situations. Some learners may also have difficulty applying what is learned in one situation to other similar situations if this step is missed.

Guide

When to Use: The Guide style is best used to complete adult learning step 5: apply concepts to the learner's situation.

Advantages: The Guide style is very effective with practical learners. Linking training concepts to learners' situations is a strong motivator for learning. It's a particularly effective style when conducting on-the-job training. The trainer who uses the Guide style encourages learners to identify a variety of ways to apply the learning points from a single activity.

Disadvantages (overusing): Guides sometimes tend to rush through the other four adult learning steps to get to the practical result or learning point.

Disadvantages (underusing): Not using the Guide style makes learning academic and less attractive to "real world" learners.

How Can You Enhance Your Training Style?

Since the ideal result of taking the inventory is to achieve a balanced use (within 8 points) of the four styles, check out whether the disadvantages here apply to your situation. Select which style(s) you want to develop and look back through the inventory to identify specific skills to develop or which skills require more practice in order for you to use them more comfortably. To enhance the *Instructor* style, focus on setting up learning activities by describing the benefits of the activity and what the learners are about to do, and set guidelines and ground rules for the learning activity. To enhance the *Explorer* style, ask questions that help learners share and interpret their reactions to the learning activity. To enhance the *Thinker* style, ask learners to generalize concepts from their learning experiences. To enhance the *Guide* style, ask learners to relate the learning experience and the concepts learned to their work. The Facilitator Processing Questions from Chapter 1 can be helpful in developing the *Explorer, Thinker,* and *Guide* styles.

The remaining chapters in this book take you through many of the methods defined in the Best Learning Experiences chart (Tool 1.1) and explain how you can facilitate each learning method using the foundation tools described in Chapter 1. The remaining chapters can also help you enhance your training style. Let's start with some elements of setting an adult learning climate in the next chapter.

CHAPTER 3

Climate Setting

Chapter Objectives

- To recognize the benefit of spending training time on session starters
- To understand what constitutes an appropriate introduction for the trainer and the participants
- To learn to balance time to keep session starters in perspective
- To understand the purposes of different types of session starters
- To learn to use three criteria to select session starters
- To use a fifth step of adult learning to process session starters
- To start a session successfully with difficult audiences
- To become aware of the role of music and graphics in setting a learning climate

Tools

- Ground Rules for Training Sessions
- Session Starter 1: Pick a Number
- Session Starter 2: What Do Team Members Have in Common?
- Sample Overview Graphic

Chapter Questions

- What are the elements of climate setting?
- What is the benefit of using session starters or icebreakers at the beginning of a training session?
- What constitutes an appropriate introduction for the trainer and the participants?
- How can you balance time allotted for session starters with the rest of the content?
- What are the purposes of session starters?
- What are some criteria for selecting session starters?
- How can you process a session starter to make it an effective climate-setting technique?
- How do you begin training sessions for difficult audiences?
- What is the role of music and graphics in setting an adult learning climate?

What Are the Elements of Climate Setting?

Setting an adult learning climate starts before the participants arrive at the training session. Through planning, the trainer arranges the physical setting to compliment the learning objectives, creates a visual overview, and decides how to welcome the participants. See suggestions in Chapter 14 for different types of room set-ups. Playing music, making introductions, setting ground rules, and sharing expectations also contribute to a positive learning climate. Climate setting demonstrates the learners' role through a session starter or icebreaker activity. Climate setting also helps to clarify the learners' expectations, as well as give a preview and transition to the content of the workshop.

What Is the Benefit of Using Session Starters or Icebreakers?

The main benefits of using session starters are to build interest, help the learners buy into the objectives of the training session, and set a climate that encourages learning. Often learners come to a training program while leaving pressing issues back at their desks. If you demonstrate the benefits of attending the training session in the first ten minutes, then commitment, participation, and retention can follow. This is also the appropriate time to tie the training program to a business need in the organization.

When describing training as a benefit to the learners or a solution to a problem, identify what the *learners* get out of training or what solutions you will provide for their problems. Benefits are viewed individually, not universally, so stating several advantages for many possible problems will make training appealing to a broader audience. For example, in a train-the-trainer session, benefits can be described this way: "In this session you will identify how to use adult learning principles to speed the rate of learning" or "You will increase your confidence in dealing with difficult learners in the classroom."

What Constitutes an Appropriate Introduction for the Trainer and the Participants

Your introduction needs to be long enough to establish credibility with the group and short enough to conserve time for essential training content. Provide information about your educational background, experience in the current organization, and experience that relates to the participants. For example, you might talk about previous jobs you have held that are similar to the participants' jobs. Perhaps telling the participants you have operated similar software or completed similar processes will help establish credibility. Also tell the group how many times you have presented similar types of training. However, if this session is the first time you are teaching a particular topic, it is better to omit that information from your introduction, since it may raise doubts and is unlikely to bring credibility to your introduction.

Whether to use participant introductions depends on how well the group already knows each other and how well you know them. If the group does not know each other, go around the room and ask for a thirty-second introduction telling "who you are, what you do, and your interest in the topic of today's training." If the group is larger than thirty people, in the interest of time, ask participants to introduce themselves to a small group of peers. This brief introduction helps place people at ease and gives them an idea of who else is in attendance. If the group already knows each other, ask participants to respond to more substantive questions about their interest in the workshop content, for example, "What types of equipment do you currently operate that are similar to what we're learning today?" "What is your experience in selling this type of product?" "What will make today's session a good use of your time?"

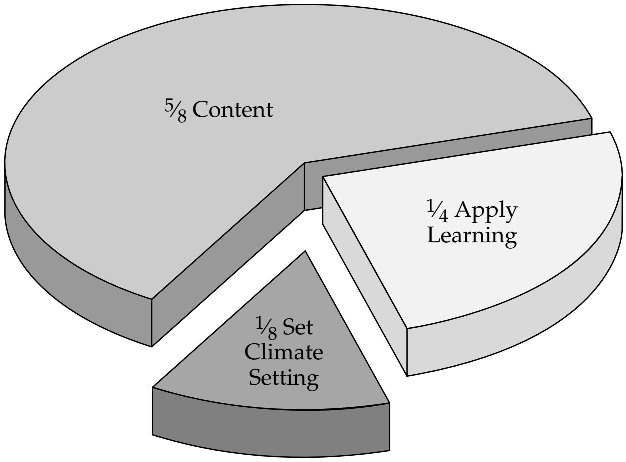
Additional information about introductions appears later in this chapter when we look at the purposes of session starters. Two sample session starter activities are also included.

How Can You Balance Time Allotted for Session Starters with the Rest of the Content?

To maintain a balance of time for session starters as well as content delivery, learning activities, summary, and application activities, think of the total training time in eight parts, as shown in Figure 3.1. One-eighth of the workshop is for climate setting, two-eighths for summary and action planning and application to the job type activities, and five-eighths are for content delivery and concept development.

This may seem like little time for the subject-matter expert who wants the learner to know "everything" about a subject, but there are alternative methods to cover the same content, such as shortening lectures by using a summary page

Figure 3.1. Balance of Time During Training



or providing resource/reference pages or pre-work, homework, remedial work, reference manuals, etc.

Dividing a training session into eighths is just a guideline. It does not mean that the first hour of an eight-hour class must be spent on climate setting or icebreakers. It means that, as the class progresses, there is a need to set or reset the learning climate several times. It is appropriate to set the climate and summarize and apply the learning to the job at the beginning.

What Are the Purposes of Session Starters?

There are typically four reasons for using session starters: to welcome the learners, to get information about the learners, to give information to the learners, and to transition to the first content module.

1. To Welcome the Learners

What can you do to contribute to making learners feel welcome? Arrive early enough at the training site to have the physical or virtual classroom set up by the time the learners arrive. This leaves you free to greet learners as they enter the room. Put them at ease with a couple of simple-to-answer questions that help them focus on learning objectives and start them talking.

2. To Get Information About the Learners

Decide what information you want from the learners during the climate-setting phase. It is helpful to find out the learners' motivation for attending the training session. Are learners "prisoners" and being sent to mandatory training? Are learners attending training as "vacationers" to take a day off of regular work duties? Or are learners interested and enthused about the topic?

How much do the learners already know about this topic? What do they want to learn about this topic that would be useful for their job responsibilities? What are the learners' backgrounds or experiences with this topic? The answers to these questions can help you pace learning activities.

If you can find out the answers to these questions *before* the class begins, so much the better. However, many trainers do not know this information prior to the arrival of the learners.

3. To Give Information to Learners

What information do you want to give the learners during climate setting? Information about your credentials and qualifications to teach this topic is helpful for establishing your credibility with learners. You will also want to identify or collaboratively establish the ground rules for this session. Some organizations print their ground rules on the back of name tents and share these rules as part of their introductions. (See Tool 3.1 for sample ground rules used during most of The Training Clinic's workshops.) Remind learners to silence pagers and cell phones. Tell learners how they can receive messages during training. Another method for introducing ground rules is to describe the learners' role in the PROCESS[1] of learning. Each letter in the work "process" stands for a ground rule.

- **P**articipate in the learning process. You get out of training what you are willing to put into training.
- **R**esponsibility for learning belongs to the learners. Seek out those parts of the training that will help you to meet your objectives.
- **O**pen minds are easier to teach. Keep an open mind and try out the concepts and skills being offered during this workshop.

[1]Contributed by Melissa Smith, Senior Instructor, The Training Clinic.

- **C**onfidentiality is required for a safe learning climate. What learners and others talk about to illustrate learning points is not to be shared with others outside this classroom.
- **E**nergy levels are important. Take care of your energy level. Drink water, eat healthy snacks. Use the restroom when you need it.
- **S**ensitivity to the learning needs and learning styles of others is appreciated. Let others participate in a way that is comfortable for them. Be mindful of monopolizing all the "air time" during training.
- **S**ense of humor helps everyone relax and enjoy the learning.

Finally, provide program content and process information, along with a schedule for the day or for the length of the workshop.

4. To Transition to the First Learning Module

How can session starters help the learner transition into the training, either at the start of the program, start of the day, or returning from a break or lunch? Have a strongly focused beginning activity that brings the learners into the content of the program and requires their undivided attention. The next section in this chapter deals with criteria for selecting session starters.

What Are Some Criteria for Selecting Session Starters?

Three criteria for selecting specific session starters are (1) involve everyone; (2) make it a low-risk activity; and (3) relate the activity to the content that is to follow. What happens if you use a session starter and some participants do not participate? It sends the message that it is okay to not participate. It can make the person who does not participate feel unimportant and learners not involved in the opening activity question the need for their involvement throughout the workshop. When selecting session starters that involve everyone, make the activities low risk so that everyone is comfortable participating. Remember, what is low risk to one learner may not be low risk to all participants. Finally, relate the session starter to the content that follows to show learners that you are not going to waste their time playing games or conducting activities that are unrelated to their work.

Tool 3.1. Ground Rules for Training Sessions

Some adult learning suggestions to get the most out of this workshop:

- This workshop belongs to YOU, and its success rests largely with YOU.
- Enter into the discussion enthusiastically.
- Give freely of your experience that focuses on the issue at hand.
- Say what you think to the group. Private conversations while someone else is speaking are distracting.
- Be prompt in returning from breaks.
- The session will start and end on time.
- Each person will speak for himself or herself.
- Speak to each other with respect and without interruption.
- Silence telephones and pagers.
- Come prepared to learn and identify your objectives.

Tools 3.2 and 3.3 are two examples of session starters that meet these three criteria. Each session starter uses the five steps of adult learning introduced in Chapter 1.

Read Tool 3.2 and decide whether or not this session starter meet the three criteria of involving everyone in a low-risk activity that is related to the content that follows? This session starter asks all participants to select an answer and then tell the answer and their rationale to a small group. Everyone can be involved, and the risk of completing this activity is low since it is discussed in small groups. However, some participants might think that this activity has a "trick" answer and that they were deliberately made to look foolish or wrong by the instructor. To avoid this perception and keep the risk low, be sure to discuss the participants' reactions and the concept behind the activity enough to help them feel comfortable with why they might not have identified the correct answer. Finally, this session starter is used most successfully when the content that follows deals with decision making, making assumptions, following literal directions, the need to ask questions, etc.

Read Tool 3.3. Did the second session starter meet the three criteria of involving everyone in a low-risk activity that is related to the content that follows? First, everyone was involved in the activity. It is low risk because they selected their own partners and small groups. It is also low risk because the groups will only inquire about or select items in common that they feel comfortable mentioning. The session starter is related to the content that follows.

Before looking at some additional session starters that are appropriate for beginning training with difficult audiences, let's first review how session starters were processed in the examples above.

How Can You Process a Session Starter to Make It an Effective Climate-Setting Technique?

Notice that the five-step adult learning process, first shown in Chapter 1, is used to work through each session starter. As part of step 1, the instructor identifies what the learners will do and why they are doing that activity, without disclosing the concept to be discovered from the activity or how the activity will be conducted. During the activity, the instructor can walk about the room and listen to participant conversations and keep track of the time. To end the activity and help

Tool 3.2. Session Starter 1: Pick a Number

1. *Set-up:* Tell participants they are going to learn something about their visual problem-solving skills. Show the following on the screen or flip chart.

   1. Five
   2. Fifteen
   3. Fifty-one

   Ask participants to tell you which number is least like the other numbers.

2. *Complete the activity:* After participants have made their selections, ask them to compare their choices in small groups of four. If there are different answers, ask each person to explain the rationale for his or her selection. Ask groups to report their selection(s) and rationale(s). After all the reports, tell the group that the correct answer is the number "2." This is least like the other numbers since it is the only even number on the screen/chart.

3. *Share and interpret reactions*: Ask participants to explain why this solution was difficult to reach. If anyone got the correct answer, ask that person what made the solution easy for him or her to identify. Ask what the person saw or did not see in the numbers shown on the screen.

4. *Identify the concept behind this activity:* Ask participants what point this puzzle teaches. Suggested answers: it is easier to get the right answer when you avoid making assumptions. It is easier to get the correct answer when definitions are shared and clear to all. Many answers can appear correct unless definitions and directions are clear. If you are able to overcome some assumptions, you can see other interpretations of the assignment.

5. Apply what is learned by asking participants how they will use what they learned from this exercise. The answer to this question will depend on the topic of the class that is to follow.

Tool 3.3. Session Starter 2: What Do Team Members Have in Common?

1. *Set-up:* Tell participants they will have an opportunity to meet other participants through some small group introductions. Say that they will use this group to work together on other activities during the workshop. Direct participants to pair up with someone they do not know or do not know very well. Ask each pair to join another pair so they form groups of four. Show the following directions on a visual on the screen or flip chart:

   "Identify five things you have in common with the other three people in your group."

2. *Activity:* allow five minutes for the discussion and tell the groups when they have one minute left. Ask different groups to report the things they have in common. Ask the entire group to identify the most unique collection of items in common and award that group four small prizes.
3. *Share and interpret reactions:* Ask the participants: What did you notice about the types of things the group found they had in common? How would you characterize the risk of the types of things the group identified (high risk to low risk)? What made this introduction easy and fun? What made this introduction difficult or laborious?
4. *Identify the concept:* Ask participants: What do the selections tell you about taking risks? What are the characteristics of risk takers? What behaviors or situations promote risk taking? (If the concept to be discovered is not about risk taking, these questions could be changed to ask about a different concept.)
5. *Apply what is learned by asking participants:* How would you assess your own risk-taking behavior? What encourages you to take risks? What do you hope to learn today that will help you evaluate your interest in taking appropriate risks?

participants move toward the concept they discovered in the activity, participants first share and interpret their reactions, which is step 2 in the five-step model. In the first session starter, participants who had a wrong answer need to understand the rationale for the correct answer and how frequently most participants do not see the correct answer. In the second example, participants are interested in finding out how some groups came up with unusual things in common.

Next, the trainer proceeds to identify the concept (step 4) by asking participants what they discovered from this brief activity. The trainer must be prepared to hear that some participants may discover something unexpected that leads the class to a different learning point. When that occurs, the trainer, with the help of the learners, must tie the concept to the content that follows. Step 5 questions are the bridge from the concept in step 4 to how learners will use the concept as part of this workshop.

Notice that each of these session starters can also be used in the virtual classroom. For example, in the first session starter, you could use the polling feature of learning management system software to have participants select the number. The rationale for each number could be discussed by sharing the microphone or by having participants use the chat feature to share ideas.

How Do You Begin Training Sessions for Difficult Audiences?

While Chapter 13 describes problem learner strategies and tactics, special consideration is also given here to selecting the right type of session starter when you suspect that there might be problem learners in a specific class. Adult learners can challenge the most prepared instructor and the best course content when some extenuating circumstances exist. Beginning a workshop well can mean the difference between a smoothly run course and spending the entire course recovering from a disastrous start.

Circumstances that often cause a difficult start include participants who are attending mandated training, who do not know why they are attending a specific training program, and who are defensive and see training as an attempt to "fix" them. If you anticipate a difficult start, begin with a review of all of the *prevention* strategies in Chapter 13. When learners arrive in the classroom for a required training session, give them as many choices as possible, such as where and with whom to sit, making their own name tents, or asking them to complete a brief inventory or questionnaire on the skills presented in the training prior to the beginning of the workshop. Having a task to complete immediately demonstrates that the class will not be a waste of time. Use a session starter that is "high task" and focuses more on the content that is to follow, rather than on socialization activities.

If you are concerned that allowing friends to sit with each other during a workshop can be disruptive, use a session starter that mixes all the participants by randomly choosing a playing card to form new groups.

You could also use a session starter that allows participants to review the course content and learning objectives and prioritize their personal objectives. Ask participants to post colored dots on a flip chart for their top three objectives. Then ask the participants to meet in teams and interpret the group's selections.

You could create a continuum that shows the number of years of experience on the topic of the workshop and another continuum that shows the number of years of employment. After having the participants post their colored dots that show experience and years of employment, ask two of the most senior participants to interpret these two continuums. These two prioritizing activities accomplish several points with a potentially difficult group. First, you are giving participants who are forced to attend training some choices that acknowledge their opinions. Second, asking the group to interpret the posted charts demonstrates that the group will be making their own choices and interpretations and that not all the information shared in the training will come from you. Be sure to acknowledge all the experience shown on the charts and mention that you will build on the experience of the group.

Finally, see Chapter 3 in *The Trainer's Journey to Competence: Tools, Assessments, and Models,* which is the first volume in *The Skilled Trainer Series,* to learn more about problem-learner competencies and the supporting knowledge, skills, and attitudes to develop advanced competencies in handling problem learners.

What Is the Role of Music and Graphics in Setting an Adult Learning Climate?

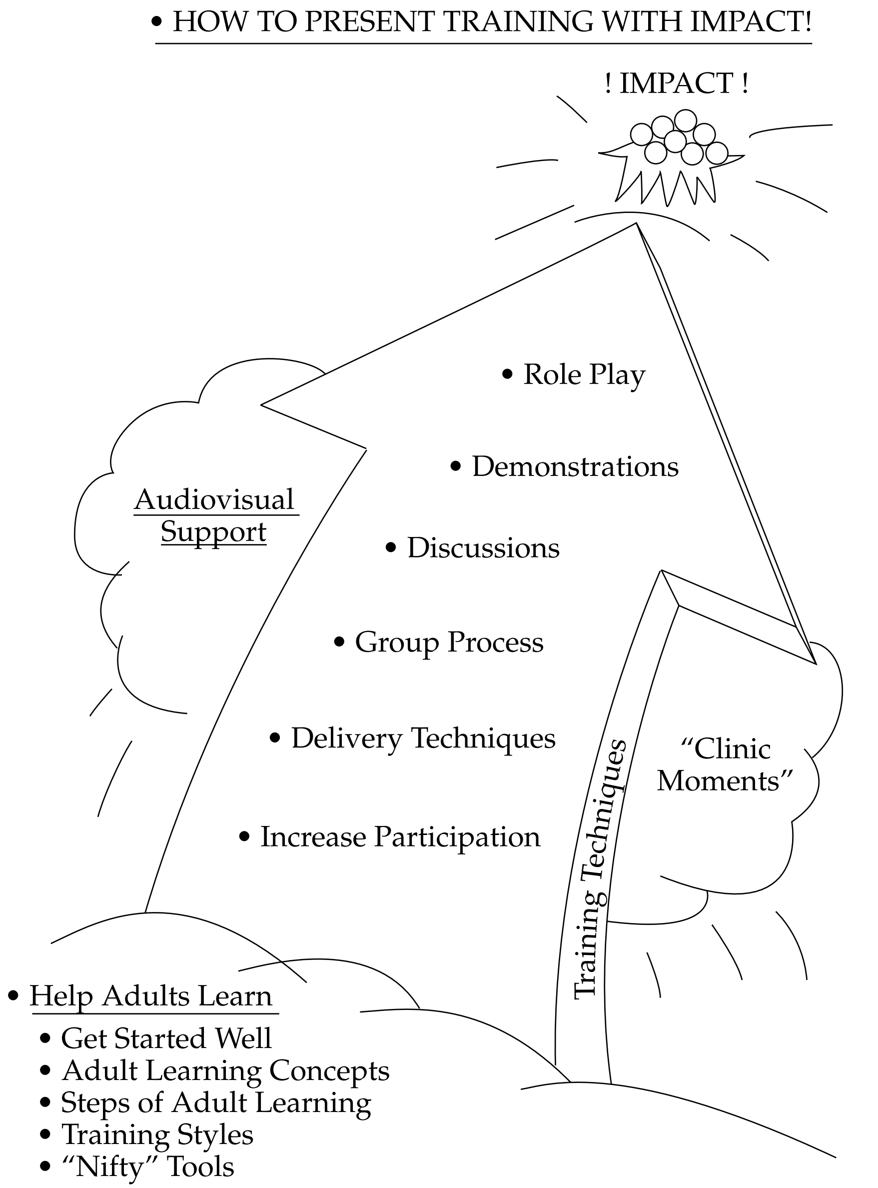
Playing background music while participants enter the physical or virtual classroom helps set an attractive and calming atmosphere. It can place participants at ease. Copyright-free music that is upbeat helps build energy in the group. Music can be used as an auditory cue. When the music volume goes down and ends, it signals that it is time to begin or resume the training session. During individual writing exercises, music can provide a calming note. However, if the volume is too loud, it can become a distraction to the learners. Experiment with different types of music that appeal to the groups you train. Instrumental music, rather than music with lyrics, seems to set the right tone and is less distracting. The bibliography contains resources for copyright-free music.

Graphics that show an overview or preview of the course are visual reminders of different parts of the course and what path the course will take to reach the objectives. Tool 3.4 shows a graphic from The Training Clinic's *How to Present Training with Impact* course. The foundation of the course starts at the bottom left of the graphic with five points that make up "Help Adults Learn." The contents of the arrow contains training techniques that will increase participation, offer alternatives for delivery techniques, and identify how to facilitate group processes and discussions. It finishes with demonstrations and role play. Each of the techniques is supported with "Clinic Moments" that help the trainer understand how adult learning concepts are designed and presented in each part of the workshop. A final unit on audiovisual support adds up to presenting training with impact, and the top of the graphic shows that impact has been reached or achieved.

An option to presenting all the information in the graphic at the beginning of the workshop is to write each unit as it is begun or finished. By the end of the training, the graphic is complete and is a useful tool to review the course content.

The next chapter will discuss how to give brief, concise, and participative lectures.

Tool 3.4. Sample Overview Graphic



Contributed by Melissa Smith, Senior Training Clinic Instructor.

CHAPTER 4

Why Lecturing Is Not Always Appropriate

Chapter Objectives

- To identify the differences between giving a presentation and training
- To identify the benefits of increasing participation during a lecture
- To learn to use twelve involvement techniques
- To learn ways to process and debrief involvement activities to improve learning and retention

Tools

- Training Versus Presenting Questions
- Sequencing Lecture Information
- The Value of ?
- Pyramid of Coins
- Inverted Pyramid
- Pyramid Solution

Chapter Questions

- What is the difference between giving a presentation and training?
- What are the best times to use the lecture method?
- What is the best way to organize a lecture?
- What is the benefit of increasing participation during a lecture?

What Is the Difference Between Giving a Presentation and Training?

Beginning trainers often confuse giving a presentation and training. Talking/lecturing is not the same thing as training. If it were, then all learning would be accomplished by listening. See Exhibit 4.1 to identify most of the differences between giving a presentation and training. Use the questions in Tool 4.1 to help decide whether you will give a presentation or conduct training.

Exhibit 4.1. Training Versus Presenting

Ask About:	Training	Presenting
Use of questions is	As a part of the learning process and throughout class	Are used to clarify and often deferred to the end of the session
The trainer's delivery is	Learner-centered	Information-centered
Communication flows	Two ways	One way
You describe the audience as	Participants, learners, students	Attendees, participants
The audience seeks development because of a	Need to do	Need to know
The role of learner is	Active since learning is discovered	Passive since information is provided
The level of participant activity	Participants active 50 percent of the time	Presenter talks, attendees listen
The audience does	Variety of activities	Listen, take notes, ask questions
Use of lecture is . . .	Kept to a minimum	Primary method
Results come from . . .	Interaction and practice	Listening or reading information
Participants gain	Skill through demonstration and practice	Understanding by listening and asking questions
Audience proves learning through . . .	Demonstration, verbal or written test, feedback	Verbal feedback
Level of learning reached is . . .	Application, analysis, synthesis, evaluation	Knowledge, understanding, comprehension

Given the descriptions in Exhibit 4.1, use the questions in Tool 4.1 to identify whether your interest is in conducting training or giving a presentation.

Which of the thirteen differences are most evident in describing how the employees with the developmental need see themselves? After answering these questions, it will be apparent whether you need to conduct training or give a presentation. Many of the choices in Tool 4.1 help you identify the context in which you train or give a presentation.

What Are the Best Times to Use the Lecture Method?

Once you have decided that your learners need training, you can reach your knowledge objectives by using the lecture method, as shown in Tool 1.1 in Chapter 1. Lectures are good tools to provide the right information at the right time. Lectures that are kept to fifteen minutes or less will not tax the attention span of most learners. If you have a longer lecture, consider using several other available methods, such as case studies, demonstrations, observations, videos, information searches, interviews, learning tournaments, and study groups, or a one-to-two-page summary of a lecture instead. After participants have read the written summary, discuss questions and implications of the information.

If you must lecture, then use the five steps of adult learning to set up the lecture and debrief it.

What Is the Best Way to Organize a Lecture?

Begin with step 1 of the adult learning process and tell the learners what they will learn during the lecture, why that is important to them, the business need this information will address, and how the lecture is organized. For example, *By the end of my lecture, you will be able to identify the product changes, which customers will benefit from the new products, and how to apply pricing guidelines. During the lecture, we will review samples of product literature and use a few case studies to apply the pricing guidelines. Questions are welcome at any time.*

The lecture itself is step 2 of the adult learning process. Think about ways to begin. Criteria include information that is relevant to the audience, involves

Tool 4.1. Training Versus Presenting Questions

1. How do you see yourself and your purpose for presenting/training others? You see yourself as . . .

   ___ a. Presenter of information whose objective is to "tell the audience . . ."

   ___ b. Presenter of information whose objective is for "the learner to understand [insert information here]"

   ___ c. Trainer who wants "the learner to be able to [insert skill here]"

2. What type of esteem or regard do others hold in the organization for those who function in the role of "trainer"?

   ___ a. High regard/esteem

   ___ b. Positive regard, but not high esteem

   ___ c. Neutral regard, but most are glad they do not have training responsibility

   ___ d. Low regard; this type of role is avoided

3. Use a percentage to describe the type of learning activity enjoyed/preferred by your employees who will attend this training:

   ___ a. Lecture presentation with visual aids and opportunity to ask questions

   ___ b. Interactive session with minimal lecture to introduce new ideas, small group discussion, "real-world" problem solving and application to the job

   ___ c. Inductive problem solving of "real-world" issues, discovery of concepts through large group, small group, and independent study, avoidance of lecture, all work is applicable to the job

Tool 4.1. Training Versus Presenting Questions, Cont'd.

4. What is your attitude toward the subjects you teach/present?
   ___ a. Excited, eager, and enthused
   ___ b. Positive, but not excited
   ___ c. Neutral
   ___ d. Negative
5. What type of visual support do you use in the training/presentation you conduct?
   ___ a. Projected PowerPoint® slide show from a laptop computer
   ___ b. Color overhead transparencies created in PowerPoint (or similar program)
   ___ c. Black and white overhead transparencies made from copies of printed material
   ___ d. Slides
   ___ e. Videotape
   ___ f. Easel pad (prepared charts)
   ___ g. Easel pad (spontaneous charting)
6. How much responsibility do you have for the design of the training materials (participant handout materials and/or lesson plan, visuals, etc.)
   ___ a. Total responsibility
   ___ b. Input and re-design responsibility
   ___ c. Offer suggestions
   ___ d. None
7. How have the organizational changes been introduced that this training supports?
   ___ a. Will be announced/explained during the training
   ___ b. Informal information provided verbally through supervisor
   ___ c. Formal announcement through regular operational channels

Tool 4.1. Training Versus Presenting Questions, Cont'd.

8. How have participants been "invited" to attend this training session?

   ___ a. Mandatory session

   ___ b. "Invited" to attend, really required attendance, benefits of attending mentioned

   ___ c. Truly voluntary attendance, benefits of attending mentioned

9. To what extent has the need for this training/presentation been tied to a business need?

   ___ a. All are aware of the business need

   ___ b. An understanding is expected, but has not been spelled out

   ___ c. No overt tie has been made to a business need

10. How were you selected for this training responsibility?

    ___ a. A part of my regular responsibilities

    ___ b. An expected "other duty as assigned"

    ___ c. Possess special skill or talent in this area

    ___ d. Expressed an interest and asked to be part of the project

    ___ e. Were identified by supervisor/manager as most available, least conflicting other duties

11. How will you become competent to teach the content of the workshop?

    ___ a. Already a subject-matter expert

    ___ b. Training is provided as part of the train-the-trainer

    ___ c. Will be expected to learn it on your own the audience, creates a positive impression, and stimulates the audience to listen. Ways to begin include:

1. Tell an anecdote, illustration, example, or story. For example, using the objective for new products above, an anecdote from a customer that demonstrates the need for the new product would capture the attention of the audience.
2. Provide a definition of terms, for example, "If our organization is to be a *full-service provider,* we intend to offer a wide range of products that meet the needs of a variety of customers."
3. Reference the occasion or the situation, for example, "Whenever we launch a new product, there is reason to celebrate and spread the excitement of our staff to our customers."
4. Cite a statistic that grabs attention, for example, "Over 25 percent of our customers have asked us to develop this new type of product."
5. Share your credentials, for example, "Before joining the training group, I was a sales representative and manager of our western region for five years."
6. State the benefits of the lecture, for example, "When you leave here today, you will have all the information and tools to sell our new product to our customers."
7. Show a picture or chart, for example, "Look at the screen and tell me what this picture/chart tells you."
8. Ask a question, for example, "What is the most frequent complaint you hear from your customers?"

Before beginning the lecture, think about how to sequence the information that is to follow. Seven ways to sequence information, the best use of each, and an example of each type of sequencing is shown in Tool 4.2.

As you cover the main points in the appropriate sequence, provide enough supporting materials or examples to help the participants understand each point. Build transitions between points prior to the conclusion.

Tool 4.2. Sequencing Lecture Information

Sequencing Method	Best Use of the Method	Example
Psychological or Priority List	To introduce a change by starting with a benefit and giving the good news first or starting with the most critical factor	We will learn new systems to speed response rate, then cover exceptions to the process
Chronological	When time is a priority	The new product rollout will begin in June, with these steps over the next three months
Job Sequence	To relate a change in a job process or procedure When adding a new task to a job	Describe the steps to lift heavy boxes or containers safely
Familiar to Unfamiliar	Change in an existing process or procedure	Accounting clerks will learn how to complete an electronic credit memo form that replaces the hard copy of this form
Geographical	Different regions have different processes or procedures	Some weather conditions in the northern regions will require additional application steps. Southern regions will use the steps as written.
Effect to Cause or Cause to Effect Problem to Solution	To respond to a current situation	Here is a brief summary of the current situation and the reasons the department is making an unusual funding request outside the normal budget
Size or Organizational Units	When volume or size makes a difference	Larger branches will receive group training first, then smaller branches

When ending a lecture, select a method that is appropriate. Here are six different ways to end a lecture:

1. Issue a challenge to the participants, for example, "You have heard how it is possible to meet the needs of our customers. Let's work on reaching 100 percent customer satisfaction."
2. Use an anecdote, story, or quotation, for example, "You get the level of service you deserve. Our customers deserve excellent service from all of us."
3. Refer back to the opening of the lecture, for example, "At the beginning of this lecture, we promised to tell you how our customers will benefit from new products. Now it is up to you to match the right product to each of our customers."
4. Identify next steps for the participant, for example, "Each of you will now receive product literature, pricing guidelines, and copies of the new order template. We'll look at how each of these tools will apply to your customers."
5. Look toward the future, for example, "We know that these new products are competitive and state-of-the-art for our customers. We are also researching even better products to continue to expand our market share."
6. Finally, consider ending with a rhetorical question, for example, "Which of you has never experienced poor service or the wrong product? Let's be sure our customers fare better."

After completing the lecture, finish the learning activity by asking participants questions for steps 3, 4, and 5 in the five-step adult learning model. Ask step 3 questions to help learners share and interpret their reactions to the lecture, such as, *What are the key points from this lecture that you want to remember? What surprised you about our new product rollout? What can we do to help improve your understanding of our new products?* Ask step 4 questions to help learners understand the concept behind the lecture, for example, *How do these new products compare to what we currently have available? What benefits will our customers see in these new products?* Ask step 5 questions to help learners apply what they heard in the lecture to their situation, for example, *Which of your customers will be attracted to these new products? What might help or hinder you in selling these products to our key accounts? What is the consequence of not bring these new products to our key customers?*

Often a lecture is thought of as a one-way form of teaching or instructing, but there are several reasons to "interrupt" a lecture for a brief participation activity.

What Is the Benefit of Increasing Participation During a Lecture?

If the content of a lecture requires more than fifteen minutes to cover, try breaking up the different parts of the lecture to conduct a brief participation activity. This will help learners focus on what they are learning, make the lecture less boring and more interesting, and improve retention. Here are twelve ways to "interrupt" a lecture and increase participation.

1. Instant Puzzle

Often you can totally involve learners in discovering a concept and talking about a learning point. Even those who are resistant will enjoy being involved in solving a problem. Here are two quick puzzles that help the learner discover different concepts.

Cross Out Letters Puzzle

Step 1: Set-Up. Tell learners you are going to show them a brief puzzle that will help them learn something about how we make assumptions. Direct learners to look at these letters on a screen or flip chart:

S I B A X N L E A T T N A E R S

Step 2: The Activity. Ask learners to cross out six letters to form an ordinary word.

Solution: the ordinary word is *banana.* You find this word by crossing out the letters, "sixletters".

Step 3: Share and Interpret Reactions. Ask: "What was difficult in finding that solution? What made it easy? What assumptions did you make about my directions?"

Step 4: Discuss the Concept. Ask: "What point does this puzzle make?" Suggested answers include, We can interpret directions differently from what the speaker means or We sometimes make assumptions about what we are directed to do.

Step 5: Learning. Ask: "What did you learn about making assumptions and listening to directions that you want to apply to your job?" Tie answers to this question to the topic of your lecture, for example, in a leadership workshop, "Supervisors often give subordinates directions that can be interpreted in more than one way"; in a business writing workshop, use this activity to help learners interpret written directions that might be used on standard forms. Ask participants to read these directions and identify how many different interpretations can be made from the directions.

Find the Value of "?"

Step 1: Set-Up. Tell learners they are going to learn something about their approach to problem solving. Direct learners to look at Tool 4.3 that shows symbols and numbers.

Step 2: Activity. Ask learners to identify the value of the "?" shown in the lower left corner of the puzzle. After about two minutes, ask who has an answer. The correct answer is 32. Ask learners to explain how they reached the correct answer. There are several methods that can be used:

- *Method 1:* The most common method participants use is to try to identify the value of each symbol, starting with the happy faces. Since four happy faces equal 24, each one is 6. Next the diamonds are worth 8. It is more difficult to determine the value of the hearts and squares. After trying out a few combinations, learners will determine that the square is worth 12 and the hearts are worth 10.
- *Method 2:* Sum the numbers in the vertical column to the right (28 + 24 + 42 + 36 = 130). Sum the three numbers in the horizontal column (34 + 36 + 28 = 98). Subtract 98 from 130 to find the answer, which equals 32.
- *Method 3:* Look at the numbers in the vertical and horizontal columns and cross out identical numbers. 28 and 36 can be crossed out. Add the remaining numbers in the vertical column (24 + 42 = 66). Subtract the remaining number in the horizontal column (34) from 66 and you get 32.

Step 3: Share and Interpret Reactions. Ask learners what made it easy or difficult to find the right answer? What drew them to solving the puzzle using the method they chose?

Step 4: Identify the Concept. What point does this activity make? Answers might include that most people use a problem-solving method that is familiar or use the first method that is suggested by the problem. Another concept taught by this puzzle is that there are easy and difficult methods that might be used to solve most problems.

Step 5: Apply the Concept. Ask learners: "What did you learn about problem solving that you will use on your job?" This puzzle can be used in problem solving workshops to illustrate simple versus complex methods of solving a problem. It can be used to make the point that often different people see a problem differently and so use different approaches.

Tool 4.3. The Value of ?

☺	☺	♦	♦	28
☺	☺	☺	☺	24
■	■	♥	♦	42
♦	♥	■	☺	36
?	34	36	28	

2. Opinion Questions

Asking learners for their opinions is a great way to increase participation. Opinion questions are especially good during a lecture because there are no right/wrong answers. Prepare opinion questions ahead of time and show them on a slide or flip chart. Opinion questions can be used in physical or virtual classrooms. Be clear about the ways learners can register an opinion.

Step 1: Set-Up. Tell learners you are going to ask them to respond to a question or statement by giving their opinions using a five-point scale. Say something like: "This will enable us to get a sense of the group's opinion about the points made during the lecture and tell us what additional work we need to do before product rollout."

Step 2: Activity. Ask learners to respond to the statements or questions using the following scale:

SA = strongly agree
A = agree
N = neutral, no opinion
D = disagree
SD = strongly disagree

Here are some sample opinion statements to present during a lecture using the agree/disagree scale:

- Most of our customers will be enthusiastic about these new products.
- We will be able to increase sales by 10 percent with this new product.
- Sales people need additional servicing options to close most sales.

Here is another scale that can be used for responding to opinion questions:

1 = extremely easy
2 = fairly easy
3 = neither easy or difficult, about right
4 = fairly difficult
5 = extremely difficult

Here are some sample opinions to ask learners to respond to during a lecture using the easy/difficult scale:

- How easy or difficult will it be to increase sales by 10 percent using this new product?
- How easy or difficult will it be to find new customers for this new product?
- How easy or difficult will it be to sell this new product to existing customers?

Ask learners to share their responses. If you are using a learning management system (LMS) in a virtual classroom, the responses are totaled and shown in a bar chart or a pie chart for you. In a live classroom, create a tally of responses and write it on the flip chart.

Another option to asking opinion questions as a poll with limited answers is to pose an open-ended question (discussed in Chapter 5) and ask learners to discuss their answers with partners or in small groups.

Step 3: Share and Interpret Reactions. Ask learners to interpret the information shown in the tally of responses. Use questions such as, "What do you notice about the group's opinion? What does that mean to you? How is that significant?" Ask learners for issues raised in partner or small-group discussions.

Step 4: Identify the Concept. Ask learners questions like, "What can you conclude from these numbers? What does this help to explain? What does this mean to you?"

Step 5: Apply the Concept. Ask learners questions such as, "How does this fit with your experience? How will you use this information? What changes can you make in your presentations to sell the new product?" The questions you ask will depend on the point you are making during your lecture. Always bring the concept back to the topic of your lecture so that learners understand its relevance.

3. Snapshot

Snapshot is a word association technique used to get an instant picture of the group's reaction. Snapshot is an especially good technique when you are dealing with a controversial subject, when learners have preconceived ideas, or when you believe they will act negatively. It helps to get that out and determine what the real issue or fear is.

Step 1: Set-Up. Tell the group you are going to go around the room and have each person tell the class the first word that comes to mind in reaction to something you are going to say. For example, when you say "IRS" or "role play," what comes to mind? Tell participants who have no response or prefer not to respond that they can say "pass."

Step 2: Activity. Tell the group the word(s) you want each person to respond to with one or two words. Rapidly go around the room and listen to each person's answer without commenting. Be sure the word(s) you choose are relevant to the lecture you have given up to this point.

Step 3: Share and Interpret Reactions. Ask questions such as, "How would you characterize the tone of the responses, positive or negative, guarded or open, hopeful or cynical? What surprised you by what everyone said?"

Step 4: Identify the Concept. Ask participants to interpret the meaning from the responses by asking questions such as, "What does this mean to you? What does this remind you of? What principle do you see operating here? Where do these associations come from?"

Step 5: Apply Concepts to Their Situation. Ask participants questions such as, "Where does this lead us? How does this fit with your experience? Where do we go from here?" Relate the responses to the points made during the lecture and to the points that are yet to be made.

4. Take a Poll

This is a good technique to obtain feedback from learners or a reaction to your lecture or to assess learning needs. For example, ask learners to raise their hands if they have been training for more than three months. Ask easy questions that anyone can answer first, and then go to more difficult questions. Polls can easily be conducted in either the physical or virtual classroom. Here are two sample polls.

Experience Poll

This poll is particularly appropriate for assessing large groups of learners with mixed levels of experience.

Step 1: Set-Up. Tell the learners that you will tailor your lecture to the audience once you know more about the experience level of the group. Ask the group about their years of experience in the topic. Show the choices for responding to the poll on a screen or flip chart and ask learners to select an option. Here are the options:

Years of experience
None
Less than one year
Two to ten years
Eleven to twenty years
More than twenty years

Step 2: Activity. Ask participants to stand up. Ask participants to respond to the poll by sitting down when their level of experience is reached. After only the last level of experience has not been reached, there will be a few learners standing. Ask these experienced learners to tell their number of years of experience. Congratulate these senior members and ask others to note these resources for later networking. In a virtual classroom, show a bar chart on the screen that represents years of experience.

Step 3: Share and Interpret Reactions. Ask questions such as, "What did you notice about the level of experience represented in the classroom? What did you notice about how the poll was conducted?"

Step 4: Ask What Concept They Learned. Ask questions such as, "What type of experience was assessed through this poll? What is the typical level of experience represented in this group?"

Step 5: Ask Learners to Apply the Concept. Ask questions such as, "How can we use the experience of this group?" Tell the learners how their levels of experience will relate to the topic of your lecture.

Voting Options

Another option for step 2 in the above poll is for learners to respond to a poll using a continuum drawn on a flip chart that shows years of experience on the job and another continuum that shows years of employment in the organization. Give participants two colored dots and ask them to place a dot on each continuum that represents their years of experience and years of employment. Ask two senior members of the group to look at the two continuums and tell the class how they interpret that information.

5. Small Groups

Small breakout groups, with participants standing or seated in groups of three to five, can be very useful to break up a lecture with a brief discussion. Sometimes learners are reluctant to express their opinions in a large group but will in a small one, as it is lower risk.

Step 1: Set-Up. The more specific the task assigned to the small group, the better the quality of the discussion. Tell the learners why they will work in small groups and how much time they will have for their task. Groups of three to five learners are best for maximum learner participation. Small groups beyond five participants are too large to gain full participation from everyone. When dividing participants into small groups, use a variety of methods to create groups, for example, numbering off and then assigning each group a place to meet in the classroom. Try using playing cards to create groups with the same suit or number or ask participants to select one of four types of candies and have the participants with the same type meet as a group.

Step 2: Activity. Here are some tasks you can have small groups do to briefly break up a lecture:

- Answer a question raised by the lecture
- Write a list of questions from the topic covered by the lecture to this point

- Brainstorm a list of options or reactions to the lecture
- Solve a problem using a methodology introduced in the lecture
- Rank alternatives posed in the lecture
- Prioritize a list of actions posed in the lecture
- Rate alternatives that appeal to the group
- Create a product using the methodology taught in the lecture
- Tell an example of a concept from the lecture
- Tell a story or share an experience related to the lecture topic
- Discuss an issue raised in the lecture

Step 3: Share and Interpret Reactions. Ask learners what they noticed about their discussion. How alike or different were the answers from different groups? Does that make a difference for the points being made?

Step 4: Identify the Concept. Have learners answer questions about what they discovered from the activity. Ask questions such as, what did your group discover? What does the model or best alternative look like?

Step 5: Apply the Concept. Have learners apply the concept to their situations by answering questions such as, "How will you use this information? What barriers do you need to overcome to implement these ideas?" Be sure to relate the activity to the lecture topic.

6. Draw a Picture

Pictures are a great way to access a participant's right brain activity. Often stick figures or symbolic drawings are made by those without any artistic talent. Here are two examples that take little artistic talent, yet make a specific point.

Draw Your Watch

Step 1: Set-Up. Begin by telling participants they are going to learn something about how their memories work and all they need are a pencil and blank piece of paper.

Step 2: Activity. Ask participants to draw pictures of their watches, without first looking at them. Direct them to include the band, hands, numbers, logo, etc. After drawings are complete, have them look at their watches and compare them to their drawings. Many will find that they connect the band at 3/9 o'clock positions, or they put numbers instead of slashes or vice versa, they use hands when the watch is digital, etc. For participants who are not wearing a watch, ask them to draw the organization's logo.

Step 3: Share and Interpret Reactions. Learners share and interpret their reactions by answering questions such as, "What differences did you notice between your drawing and your watch? What made it difficult to draw an accurate picture of your watch, especially when you look at it often during a single day?"

Step 4: Identify the Concept. Learners identify the concept by answering questions about what they learned by comparing the pictures of their watches in memory versus the actual watches. Relate the concept to the topic of your lecture. For example, in a supervisory workshop, ask participants whether their picture of their subordinates' skills might be different from subordinates' actual skills. In a customer service workshop, ask participants if the picture customers have of their service might be different from the employees' picture of customer service.

Step 5: Apply the Concept. Learners apply the concept to their situations by answering questions like, "What is your memory from this activity? How can you more easily remember critical details?" Be sure to relate the concept to the topic of your lecture.

Divide an Acre

Step 1: Set-Up. Set up the activity by telling participants they are going to learn something about the values that are important to them and that individuals have different values that can be explained. Ask participants to use pencils and blank paper.

Step 2: Activity. Ask participants to draw squares on their pieces of paper about three inches by three inches. These squares represent an acre of property that they want to give to their children. Tell participants that, for the purpose of this exercise, they have four children, that three turned out pretty well and one is a "bad" person. They are to divide their property among their children, and also place an "X" to symbolize where they will build a house for each child who receives property. After the drawings are complete, have participants share their drawings in groups of three or four and compare similarities and differences in the drawings. Ask each person to explain his or her rationale for the division and where the houses are located.

Step 3: Share Reactions. Learners share and interpret their reactions by answering questions such as, "What is the rationale for dividing the property equally among all four children? What is the rationale for an inequitable division?"

Step 4: Identify the Concept. Learners identify the concept from the drawing activity by answering questions like, "What values are shown in these drawings?" A typical drawing is shown in Figure 4.1 and represents values of equality. Since the houses are placed in the center of the drawing, this represents occupying or claiming all the space in the quarter acre. Figure 4.2 represents other values. Although the property is divided equally, the houses are placed closer together to leave room for growth and occupation by future generations.

Step 5: Apply the Concept. Learners apply the concept to their situations by answering questions like, "How can you apply what you learned about the different values expressed in these drawings?" Using this drawing activity in a diversity workshop will help participants understand another person's values and how values influence a person's behavior toward others within or outside their group.

7. Finish the Lecture

Prior to the end of a lecture, ask the participants to finish the lecture for you. This task can be completed in a large group or in small groups by answering questions such as:

- What points have not been addressed that you think are important?
- What do you think would be the next step?
- What are the five major points we identified?
- We listed six steps. What was the third one?
- What are some examples of how you can apply with we've been talking about?

The key here is that the participants do the talking, not you, since that's one of the ways for you to obtain feedback from the group and to determine whether your lecture is truly finished, that is, whether everyone grasped the concepts you were trying to get across.

Figure 4.1. Sample Division of Property 1

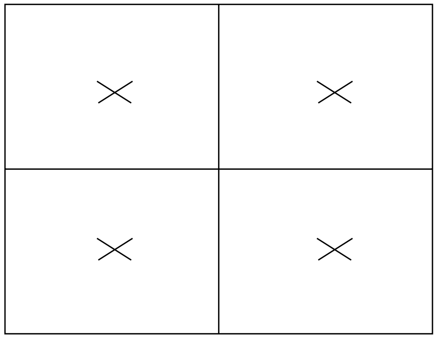
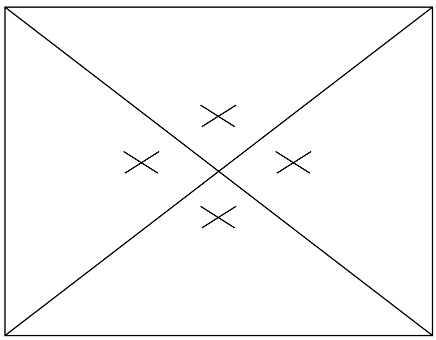


Figure 4.2. Sample Division of Property 2



8. Make a Summary

Just like "finish the lecture," this technique for gaining learner participation during a lecture can be completed in either a large or small group. It is a good technique to use when a lot of factual information is provided in a lecture, such as product knowledge training to a sales force or new employee orientation.

Step 1: Set-Up. Set up the summary activity by telling participants they will be asked to make a summary of the points provided in the lecture and that this will provide good feedback to you. Tell the participants they will have a few minutes to prepare a summary individually from their notes and then make a small-group summary.

Step 2: Activity. Ask participants to write a one-paragraph summary of the main points they learned from the lecture. Options to making a summary list can be to create a drawing, make a group collage, write a list of questions that the lecture answered, along with the answers, or identify how they will apply the main points. Small groups then consolidate their lists.

Step 3: Share and Interpret. Learners share and interpret their reactions to the summary activity by answering questions such as, "How easy or difficult was it to create your summary? What valuable ideas are part of your summary? What was significant that you discovered? How do all these pieces fit together?"

Step 4: Identify Concepts. Learners identify the concept from the activity by answering questions like, "What did you learn by writing your own summary? What did you learn from others in your group about the main points in the lecture? What do you want to take away from this lecture?"

Step 5: Apply Concepts. Learners apply the concepts to their own situations by answering questions like, "What barriers do you see in trying to use these ideas? How will you overcome these barriers? How will these ideas change your work? How does this information fit with your experience? What will you do about that?"

9. Audiovisuals

There are a number of audiovisuals you can use that work like the instant puzzle shown earlier. Short films can be used for interest, such as the comedy routine about communication problems shown in *Who's on First* with Abbott and Costello. Be sure to observe copyright laws when showing commercial media in your classroom.

Visuals of cartoons can add interest and provide examples of your teaching points. There are copyright restrictions around using cartoons, and permission is easily obtained from newspaper syndicates.

Consider using music in your classroom. For example, use music in the background while working on projects and for crowd control to designate breaks times. Be sure to use licensed music, not just a commercial CD you bring from home. Again, this is a copyright issue. Select the tempo of music to match the learners' activity level. Play up-tempo music when groups stand and stretch. Music gets them active, and people usually work faster when standing. It is also helpful to use music as a transitional cue to have them sit down when they are finished with a small group activity. Music provides an end to the activity or a break and helps bring the group back from their activity.

10. Hands-On, Do It!

Where it's possible, have participants actually do something you are talking about, for example, provide a mock-up of a cash register board, practice on the computer with mock data, or take a simulated customer call. Do something that is part of the process being taught. Use a sorting activity to have participants sequence key ideas on index cards.

Identify Differences

Step 1: Set-Up. Set up the activity by telling participants they will learn something new about their observation skills. Select three pens that have different purposes and different ink colors: Magic Marker, whiteboard marker, and a transparency pen. Pass the pens to one participant and ask that person to identify one difference they see in the three pens not mentioned by someone already.

Step 2: Activity. Each person in the group holds the pens, in turn, and identifies a difference, such as color of ink, shape, purpose, manufacturer, length, width, girth, caps, graphics, writing fonts, etc. In groups larger than fifteen people, after twelve to fifteen people have identified unique differences, ask a few more people to randomly identify differences.

Step 3: Share and Interpret. Have learners share and interpret their reactions to the activity by answering questions like, "What made this activity difficult or easy? What surprised you about it? What did you notice as the pens moved closer to you? Were there any surprises?"

Step 4: Identify the Concept. Have learners identify the concept from this hands-on activity by answering questions such as, "What difference did it make when you had the pens in your hands? What did you learn about your attention to detail?"

Step 5: Apply Learning. Have learners apply what they learned about visual identification by asking questions like, "How can you use this experience to improve your identification skills? What barriers do you need to overcome to make use of this information? How can this activity make you more effective?"

Be sure to relate the hands-on activity to lecture points you have made or are about to make.

Coin Pyramid

Step 1: Set-Up. Set up the activity by telling participants they are going to learn something about visual problem solving through physical manipulation. Ask participants to find ten coins in their pockets of wallets. If coins are not readily available, provide round tokens, such as poker chips. Tell participants they will arrange coins and move only three coins to invert the pyramid of ten coins.

Step 2: Activity. Ask participants to arrange the ten coins in a pyramid with four coins on the bottom row, three coins on the row above that, two coins in the row above that and one coin on top. See Tool 4.4 for the original set up and Tool 4.5 for the inverted pyramid. Tell participants to move only three coins to invert the pyramid. Tool 4.6 shows the solution. After a few minutes, ask a learner to demonstrate the solution. If a group is having difficulty finding the solution, show the solution on the screen and ask the participants to try it out.

Step 3: Share and Interpret. Have learners share and interpret their reactions to the puzzle-solving process by answering questions such as, "What happened when you tried to invert the pyramid? What helped or hindered the process? What roles did each person in your group play? What did you notice about your process?"

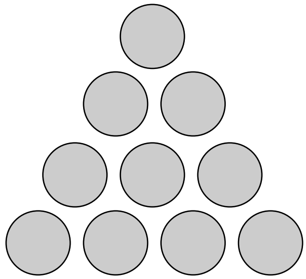
Step 4: Identify the Concept. Ask learners to identify the concept by answering questions such as, "What do you want to remember about this problem-solving process? What did you learn or remember about using manipulation to solve a problem? Did it make a difference that you could actually move the coins to try out a solution? How does this relate to other experiences you have had?"

Step 5: Apply the Concept. Have learners apply the concept to their situation by answering questions such as, "How will you use these skills to solve other problems? How can you improve on your problem-solving skills?" Be sure to relate the inverted pyramid to the topic of your lecture. Workshops where this problem might be used include identifying learning styles or problem-solving training.

11. Programmed Notes

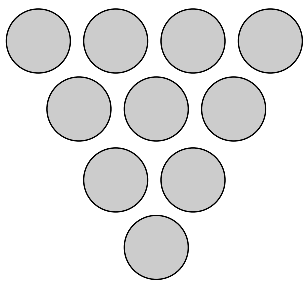
Programmed notes are an outline of points you will cover during your lecture with space for participants to write points they want to remember. What participants write as notes is somewhat based on their learning styles. Visual learners

Tool 4.4. Pyramid of Coins*



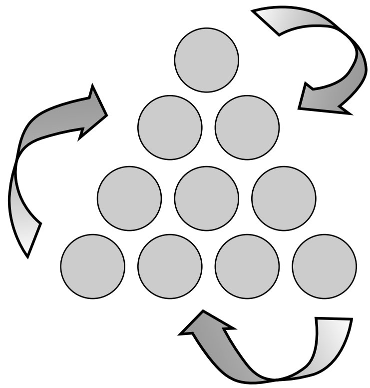
*Graphic created by Linda Ernst. Used with permission.

Tool 4.5. Inverted Pyramid*



*Graphic created by Linda Ernst. Used with permission.

Tool 4.6. Inverted Pyramid Solution*



*Graphic created by Linda Ernst. Used with permission.

tend to write lecture points or ideas in lists or record their ideas as a mind map. Auditory learners rarely write many notes. The outline provided in programmed notes is enough for them to remember the lecturer's points. Kinesthetic learners, who often multitask during lectures, may write ways to apply ideas they want to try out from a lecture. Some learners prefer notes that include a copy of the visuals they see on the screen. Programmed notes are not intended to be fill-in-the-blank or guess-the-word activities.

12. Instant Quiz

A quick way to infuse activity into a lecture is to give an instant quiz. Ask participants to number a blank piece of paper from 1 to 5. Ask five short-answer questions that will encourage recall of the lecture's main points. Another type of quiz is to ask participants to respond to five random questions by writing the first answers that comes to mind. For example:

1. I'm going to ask you to jot down five things on a blank piece of paper. You'll learn something about the importance of quizzes from this activity.
2. 1: name a flower. 2: name a piece of furniture. 3: name a color. 4: pick a number between 1 and 5. 5: name an animal in the zoo. Here are the "correct" answers. Let's see how many answers you have that are similar to mine. Answers: 1—daisy or rose, 2—table or chair, 3—red or blue, 4—three, 5—any animal from the cat, bear, or monkey family. How many of your answers matched the answers I read?
3. Ask learners to share and interpret their reactions by answering questions like, "What made answers 'right' or 'wrong'?"
4. Help learners to discover the concept by answering questions such as, "What does this demonstrate?" This activity focuses on commonalities rather than differences.
5. Help learners apply the concept by answering questions like, "When might this type of quiz be useful?" Perhaps during new employee orientation to show we might have more in common than is first apparent. Use this quiz during a conflict-resolution training session to illustrate how to find common ground, rather than focusing on differences. If your quiz is a factual review, be sure learners get the right answers before continuing with your lecture.

The key for both puzzles and quizzes is to be sure that they are relevant to the topic, since adults hate to have their time wasted. Process each activity by using the five steps of adult learning. When using any of these twelve techniques to increase participation during a lecture, relate it to the lecture points and provide a transition from the lecture to the activity using step 1 of the five-step process and transition back to the lecture by using the fifth step in the five-step adult learning process.

The next chapter provides information about how to facilitate training activities.

CHAPTER 5

Discussion and Facilitation

Chapter Objectives

- To learn the difference between facilitation and training
- To learn the responsibilities of a discussion leader or facilitator
- To learn different ways to begin a discussion
- To understand how to ask overhead, direct, redirect, and reverse questions to gain fuller participation
- To ask open and closed questions to appropriately direct the discussion
- To decide when to use each of ten facilitation techniques

Chapter Questions

- What is the difference between facilitation and training?
- What are the duties and responsibilities of a discussion leader or facilitator?

- How are different types of questions used to facilitate discussion?
- How are facilitation techniques used to promote discussion to meet a learning objective?
- How can paraphrase be used during a discussion?

What Is the Difference Between Facilitation and Training?

A trainer or instructor is often a content expert, while a facilitator is a process expert. A trainer uses lecture, conducts demonstrations, supervises skill practice, and corrects the learners' mistakes. A facilitator leads discussions and helps participants learn from their own experiences and shared information. The trainer might lead a discussion about the course content and a facilitator will focus more on the process of a discussion. Table 5.1 shows the differences between a trainer and a facilitator.

What Are the Duties and Responsibilities of a Discussion Leader or Facilitator?

A discussion is primarily an exchange of opinions and feelings, and of facts secondarily. Successful discussions include listening to others. Since opinions are neither right nor wrong, a facilitator encourages everyone to contribute to the discussion. A facilitator comes prepared, knowing what kinds of questions to ask. Learning through discussion takes place when the participants are made to think. You must also use the five steps of adult learning to lead a successful discussion.

Step 1: Set up the discussion by telling the learners the objective of the discussion, what they are going to talk about, and how the discussion will be conducted.

Table 5.1. Training Versus Facilitation

	Trainer	Facilitator
Focus is on	What is discussed	How the discussion progresses
Attention is on	Task Purpose Result/outcome	Method and processes Group dynamics
Knowledge needed includes	Subject-matter expertise	Group dynamics
Skills needed include	Offers ideas Discusses ideas Solves problems Makes decisions	Facilitates and leads discussions Sets rules Helps others follow guidelines

Step 2: Facilitate the discussion by asking questions and evaluating responses to build to a learning point. Help the participants to summarize the main points of the discussion. (See the ten facilitation techniques later in this chapter for other roles for a facilitator during a discussion.)

Step 3: Learners share and interpret their reactions to what was discussed by answering questions.

Step 4: Learners identify the concept from the discussion by answering questions.

Step 5: Learners apply what was learned during the discussion by answering questions.

During a discussion, it is not appropriate for you as a facilitator to act as the technical expert if the content of the discussion is meant to come from the participants; so refrain from making a presentation. Also, do not impose your personality on the group by giving unsolicited opinions.

Your role as a facilitator is to manage the group process and to support everyone to participate and to do his or her best thinking. Facilitators often gather ideas and lead the discussion and focus on guiding without directing. Facilitators help the group begin a discussion by initiating, proposing, and making suggestions. Facilitators use questioning to elicit information and opinions from the group as well as have group members relate specific examples to a general idea. A facilitator helps individuals build on the ideas of others while listening for common ideas from the group. A facilitator brings clarity to the group's discussion by paraphrasing, keeping the group focused on the task, barring irrelevant details, and redirecting discussion as needed. A facilitator helps the group conclude its discussion by testing for consensus and helps the group to summarize the main points or even helps the group express common sentiment and themes. When needed, the facilitator helps promote harmony and resolve differences. The facilitator helps the group set ground rules, manages the time, and encourages participation of all by drawing out quiet participants.

How Are Different Types of Questions Used to Facilitate Discussion?

Four different types of questions are especially effective to facilitate or direct a discussion. These include overhead, direct, reverse, and redirect questions.

Overhead Questions

Overhead questions are asked of a group at large without specifying a particular person to answer the question. For example, "How would you use an overhead question?" Overhead questions are best used as a discussion opener, to ask the group to summarize a point, to test for consensus, or when there is a risk in answering the question. Beware of the 80/20 rule when using overhead questions: 80 percent of the volunteer responses will come from 20 percent of the group. Use a variety of types of questions to gain shared participation. Additional examples of overhead questions include, "What are some additional examples of overhead questions?" "How have you been doing this process up to now?" "What is the purpose of a methods variety scale?"

Direct Questions

Direct questions are asked of a particular person or member of the group. For example, "Bob [call on a person by name], when might you use a direct question?" Direct questions are best used to get feedback, to reward an expert, to "refocus" a wanderer, to include a quiet member, to stop a rambler, and to control the discussion. Be careful when using direct questions as a disciplinary technique to help the wanderers to refocus their attention. Quiet participants are often uncomfortable becoming the center of the group's attention. When using direct questions to control the rambler, politely interrupt the rambling participant and summarize using a direct question that can be answered in a word or two. For example, "So, Bill, you're saying you want us to take immediate action on the new policy, right?" As soon as Bill indicates agreement, turn away and direct the discussion back to the topic you want discussed. Whenever using direct questions, first say the person's name to ensure his or her attention, then ask a complete question in case the participant did not hear the entire previous discussion.

Avoid using direct questions to "put someone on the spot," since this can increase an individual's discomfort and may shut down the entire discussion.

Reversed Questions

Reversed questions refer the question back to the person who asked, for example, "What do you think about that?" Use reversed questions to clarify the question, to paraphrase the questioner, to help the asker discover or think out the answer for him- or herself, to clarify a challenging question, if you think your answer/opinion will bias the group, or when you don't know the answer. Use this technique carefully to encourage others to clarify and think. However, do not avoid answering a question when it is appropriate that you do so. Here is an additional example: "It sounds like you have a strong opinion about that. How have you been doing the process up to now?"

Redirected Questions

Redirected questions are asked of the facilitator and redirected to the group or to a particular person, for example, "When would you redirect a question asked of you to other participants?" Use redirected questions to use group expertise, when no specific "right" answer exists, to get to the group's opinions, or when you don't know the answer. Additional examples include: "Let's see what the rest of the group thinks." "Someone in the group has had experience with that product. What do you do in your region?"

Open and Closed Questions

In addition to overhead, direct, reversed, and redirected questions, a facilitator uses closed, open, and follow-up questions to lead a discussion. Use closed questions to clarify a point and to direct or control a discussion. Closed questions can be answered adequately in a *few* words. Closed questions help participants make identifications or selections as well as answer simple "yes" or "no" questions. For example:

- "What kind of machine is this?"
- "Who is responsible for distributing this form?"
- "Do you think closed or open questions are better at promoting discussion?"
- "Who is right, the supervisor or the trainee?"
- "Does preparing the lesson plan come before setting learning objectives?"
- "Is the first step in problem solving to obtain the facts?"

Many closed questions begin with are, can, was, did, do, which, or when.

Open questions require *more than a few words* to answer adequately. Use open questions to explore a rationale, to gain greater insight into a participant's contribution, to help apply a learning point, or to elicit more information to solve a problem. Open questions are subjective when focusing on opinions and can be objective when focusing on factual information. For example:

- "What do you think about that?"
- "Why should Alex lead the group?"
- "Why do you think the teller found the error?"
- "What evidence did the police have?"
- "How have you been handling the process until now?"
- "What factors are necessary in a good training situation?"
- "What should the supervisor do now?"
- "How would you implement the five steps we just discussed?"

Open questions begin with: what, why, or how.

Be aware that open questions require preparation by the participants prior to answering them. Participants can become defensive when asked open questions that start with *why.* Open questions that begin with what or how are often easier for them to answer.

Follow-Up Questions

If you want more participation, consider using follow-up questions after initial open questions. Use follow-up questions to clarify or to help the learner understand the original question, to expand, probe or dig deeper into the same idea, or to get additional ideas. For example:

- "What are other examples of that?"
- "What else has happened when you completed that step?"
- "Why do you think that happened?"
- "Has anyone else had that same or a similar experience?"
- "Tell me more about that."

How Are Facilitation Techniques Used to Promote Discussion to Meet a Learning Objective?

To succeed in getting the right amount of class participation through questions, try these six steps:

1. Preparation

Plan questions in advance. Wording can be critical. Try answering your questions from the learners' points of view. What are their possible answers? Some questions must be spontaneous, but plan follow-up questions for more difficult leading questions. Develop a variety of difficult and easy questions and space them for better pacing. Realize that your function is to start and sum up the session as well as to keep the discussion going. This requires a commitment to keep quiet and not provide easy answers to your own questions. Be sure you allow enough time for the discussion or, if not, trim the content a bit.

2. Ask the Question

Many training sessions begin with the facilitator saying, "If you have any questions, please ask them." Then the instructor goes on with the "presentation" and participation doesn't develop. Learners don't start the discussion, since they are usually not prepared to ask questions. You must prepare for how the discussion will begin and then ask as many questions as needed to keep that discussion on track.

3. Wait

The average facilitator waits between two and five seconds for an answer from participants. This is because the wait seems ten times longer than it really is, and the tension of silence weighs more heavily on the facilitator than on the participants. Remember, the learner must digest the question, realize an answer is expected, consider possible answers, put the answer into words, consider the risks and correctness of answering, then answer. To give learners time to prepare an answer, try to repeat or rephrase a question, ask learners to write down their responses, or ask learners to discuss their answers with partners or in a small group and report back to the class.

4. Call on Someone by Name

Initially, ask those who appear to have the right answers. Watch for body language that indicates enthusiasm, attention, or willingness to speak. Later, shift to more timid learners and call them by name. Remember that timid learners can respond more easily to opinion questions than to factual questions.

5. Listen to All Answers and Use Paraphrase Techniques

Listen to, talk about, and consider all answers. This reinforces participants for responding to your questions. Follow up on any response if the meaning is even slightly unclear or if the question is only partially answered. Try to remember who says what. This is especially useful during the summary.

Based on learner response, vary the difficulty of the next question you ask. Decide whether the next question should go deeper into the topic or be on another subject. Be careful to monitor time and keep the content of the discussion on track.

6. Review, Reinforce, Repeat

Review, reinforce, and repeat main points by asking one of the learners to summarize the discussion. Credit individuals with their contributions, ask the group to identify any essential points that are overlooked, or have everyone write his or her own summary and share it with a partner or the group, depending on number of participants.

In addition to the six steps above to facilitate a discussion, use the following ten techniques to make discussions run smoothly:

1. Initiate, Propose, and Make Suggestions. Deliberately set the stage for the work the group needs to do by clarifying the discussion's original purpose and suggesting approaches to accomplish it. You might use this technique to start a meeting or a discussion, if the group needs to refocus, if the group is running dry of ideas, or when the group is better at reacting than initiating.

2. Divide into Subgroups. Increase involvement and energy by lowering the risk of participation and increasing the amount of "air time" to surface multiple aspects of an issue quickly. You might use this technique when you want more participation, to encourage quiet participants, to provide a change of pace, to explore an idea in greater depth, and when the risk of participating in a large group is too great.

3. Use Questioning to Draw People Out, and to Elicit Information and Opinions. Create a comfortable opening for participants to share ideas, thoughts, and concerns. You might use this technique in the early stages of a discussion while participants are becoming comfortable with the situation and each other, to help the group stay divergent, to find additional information, to solicit additional opinions, and when ideas start to dry up or slow down.

4. Use Silence to Make Space. A short pause can give participants the time to collect their thoughts and decide what they want to say and how they want to express it. Quiet participants may not be contributing for a variety of reasons. They may be intimidated by more verbal participants, they may be unsure of the reception for their ideas, or they may feel inferior to others in the group and not want to seem foolish or "not as smart." You might use this technique to allow participants to decide what they want to say, when quiet participants need to think about participating, when participants need to determine the personal risk of participating, when you think the group knows the answer, to allow participants to get in touch with ideas and feelings, when a participant gives a "wrong" answer, and when participants are confused or agitated.

5. Keep Track of Multiple Topics and Build on the Ideas of Others. Keep track of the various elements being discussed and treat each as valid and worthy of discussion. Help the group round out its discussion by surfacing points of view that may be present but have not been expressed. When you publicly keep track of the various issues, it helps the participants stay involved and engaged. You might use this technique to help the group add ideas from their own experience to group brainstorming, to help the group stay divergent and avoid convergent thinking too soon, when the group gets stuck, when the idea is incomplete, when others have expertise to add to the idea just expressed.

6. Use Flip Charting to Generate Additional Discussion and to Record Ideas. Strengthen full participation by charting to validate ideas, to provide a record of a discussion, and to stimulate new—often more creative—ideas. You might use this technique to keep a visual reminder of ideas from the group, to acknowledge and demonstrate value in contributed ideas, to help sort and organize ideas as they are collected, to record concepts identified by the group, to encourage participation and discussion, and to focus the discussion.

7. Listen for Common Themes, Bar Irrelevant Details, and Redirect Discussion. When different opinions or disagreements polarize a group, it is difficult for participants to recognize that they have anything in common. Set aside comments not relevant to the discussion; validate areas of disagreement; and focus on areas of agreement. You might use this technique when a contribution is unclear, when a contribution is taking the group offtrack, when time is critical, and when a participant is confused.

8. Organize the Sequence of Speakers. Publicly create a speaking order. This procedure relieves you of the responsibility of keeping track of who is to speak next. You might use this technique when several participants want to speak at once, when participants are interrupting one another or vying for attention, and when you personally can't keep track of who has spoken and who is waiting to speak. To do this, name the order of participation or write the sequence of speakers on a flip chart.

9. Paraphrase to Clarify or Show Understanding. Use your own words to reveal what you think the speaker meant, to clarify, and to validate your understanding. Ask for confirmation that you "got it right." You might use this technique when a participant's information is unclear, when the participant is upset and needs acknowledgement, or when a participant has given a lengthy response.

10. Have Group Members Relate Specific Examples to a General Idea or Make a Summary. Support participants to identify what is important from the group's discussion—what it really means as it relates to the discussion's original purpose. You might use this technique when the group has had enough input and needs to develop a theme/concept, when several ideas are "on the table" and no organization is apparent, to eliminate confusion, to make the example of greater value to others in the group without similar experience, at the end of a module, before a transition to the next content piece, before a break or at the end of the day, and to be sure the group has the idea, especially if it is a foundation for future information.

How Can Paraphrase Be Used During a Discussion?

Effective paraphrasing is not a trick or a verbal gimmick. It comes from a facilitator's desire to know what the participants mean. To satisfy this desire, the facilitator reveals the meaning of the speaker's comment. This gives the other person the ability to check whether it matches the meaning that was intended. A participant's general comment may convey something specific or an example. Paraphrase by making a comment or asking a question. For example:

Participant: I think this is a very poor report.
Facilitator: You think the report has too many inaccuracies?
Participant: No, the report is accurate. The binding comes apart easily.

The participant may make a specific comment or give a specific example and it may convey a more general idea. For example:

Participant: Do you have twenty-five pencils I can use for an activity?
Facilitator: Do you just want something to write with? I have about fifteen pens and ten or eleven pencils.
Participant: Anything that writes will do.

To develop skill in understanding others through paraphrasing, try different ways of conveying your interest in understanding what another person means and revealing what the other's statements mean to you.

A good facilitator uses questions as a core skill and as a means of processing the five steps of adult learning, while also using other methods for great training delivery.

The next chapter deals with facilitating inventories, exercises, games, and simulations.

CHAPTER 6

Facilitating Inventories, Activities, Games, and Simulations

Chapter Objectives

- To learn how to facilitate three types of inventories
- To learn how to facilitate short-answer exercises
- To learn how to facilitate games and simulations

Tools

- Inventory Question Template
- Sample Inventory: Time Management Opinions
- Sample Short-Answer Activities
- Questions to Facilitate Short-Answer Activities
- How to Evaluate and Select an Existing Game
- How to Design a Game Checklist
- Processing Questions for Games and Simulations

Chapter Questions

- Why are inventories, activities, games, and simulations appropriate learning techniques?
- What are three types of inventories, and how is each type facilitated?
- How are short-answer activities facilitated?
- What techniques are used to select and facilitate games and simulations?

Why Are Inventories, Activities, Games, and Simulations Appropriate Learning Techniques?

Each of the types of learning strategies above is appropriate to teach knowledge and skills and to influence learners' attitudes. Each generally has an introspective or reflective component and allows the learners to arrive at specific conclusions that come from data or ideas outside of themselves. Introverted learners will enjoy the opportunity to think about what they have learned. Extroverted learners may be impatient to try out what is learned and may not want to discuss the concepts behind these activities. Having the right balance of activities is important to the learning process for both introverted and extroverted learners.

Inventories usually help learners identify preferences, interests, skill gaps, and other insights that can be the first step to new learning. *Activities* are often an opportunity to practice a skill or try out or personalize a new skill. *Games* and *simulations* are intended to place learners in situations in which they will act and make choices that will reveal gaps, build skills, and help them practice how to apply skills in an environment that is similar to their workplace.

Each of these types of learning strategies is non-threatening when facilitated appropriately. Learners discover something new about themselves and are able to apply what is learned more readily than when learning is passive.

What Are Three Types of Inventories, and How Is Each Type Facilitated?

Most inventories used in a training setting fall into one of three categories:

- Commercial or standardized instruments
- Casual inventory of skills
- Questionnaires

Commercial or standardized instruments are research-based, designed by experts, and validated to provide consistent and reliable results. Examples include the Situational Leadership Behavior Inventory,[1] The Myers-Briggs Type

[1]From Ken Blanchard Companies

Indicator (MBTI)[2], or the Herrmann Brain Dominance Instrument.[3] Each of these instruments is a "controlled" inventory and requires the facilitator to complete specific training to become qualified to administer it and interpret the results. The benefit of using these instruments is to provide objective information about one's preferred style of leading subordinates, understanding personality styles, and understanding how our brains works. Once a person knows his or her own preferences, it is easier to become flexible when dealing with others, whether they are subordinates, peers, or customers. Using a standardized instrument gives credibility to the results, when they are administered by a trained facilitator.

Your role as the facilitator is to help learners discover valid results that can be used in a positive way. Use the five steps of adult learning to assure complete discovery learning.

In step 1, set up the learning activity by telling the purpose of the inventory, what type of information the learners will discover about themselves, and how to complete and score the inventory. In step 2 the learners complete and score the inventory. Be sure learners know the value of trusting their first reactions, or staying in the same context while answering all the questions. Some inventories are not valid unless all questions are answered. Sometimes, inventories are self-scoring, while others are scored by the facilitator and interpreted using a computer database. Next, the learners need an opportunity to reflect on the results and possibly share and interpret their reactions to the results. For example, it has been found that, while results using the MBTI are often accurate, they may not be accurate in all four dimensions. Identification of whole best-fit types and reported MBTI types agreed for 75 percent of the subjects; approximately 96 percent agreed on at least three of the four preferences.[4] To help learners understand the results of these inventories, ask questions like, *To what extent do these results accurately describe you?* or *How consistent are these results with your experience?* It is inappropriate for you to tell a learner that he or she is a particular type just because that's what the results show. Use step 4 questions so that

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[2]Distributed by Consulting Psychologists Press

[3]Herrmann International

[4]Isabel Briggs Myers, Mary H. McCaulley, Naomi L. Quenk, and Allen Hammmer. *MBTI Manual: A Guide to the Development and Use of the Myers-Briggs Type Indicator* (3rd ed.). Palo Alto, CA: Consulting Psychologists Press, 1998, p. 198.

learners can identify the concept behind an inventory, such as, *What is the benefit of knowing your personality type and the type of your subordinates?* Finally, ask step 5 questions like, *How will you use this information to build rapport with your team?* See Tool 6.1 for more questions to process inventory activities.

A *casual* inventory of skills is an informal way for learners to identify skill gaps and set personal objectives for a workshop. The Trainers Style Inventory in Chapter 2 is a good example of a self-administered inventory that is easy to take and interpret. You need no formal training to administer this inventory. Just as with a commercial inventory, take the learner through the five steps of adult learning to get the full benefit of using the inventory. The questions in Tool 6.1 can be used to facilitate a discussion of this type of inventory.

The third type of inventory is a *questionnaire* or series of statements the learners read to calibrate their opinions. Tool 6.2 shows an example of a questionnaire from a time management workshop. Just as with the other two types of inventories, you can use the five steps of adult learning to process this type of questionnaire. In step 1, set up the learning activity without revealing too much about the inventory or coaching participants about what they will discover. Tell participants they are going to discover some useful information about how they prefer to interact with their subordinates or about how they value their time. Be sure learners understand the value of identifying their own opinions prior to discussing them with others. Some participants may be eager to collaborate on their reactions with others. Ask them to refrain from revealing their answers until everyone has finished answering all the questions. Follow the debriefing or processing questions in Tool 6.1.

Often, just administering and interpreting an inventory by itself is not enough to help learners apply the concepts behind the inventory. Case studies, activities and other methods can enhance the learning experience to provide greater learning and application. Let's look at different types of activities, games and simulations that can be used to expand on what learners discover about themselves from completing an inventory.

Tool 6.1. Inventory Question Template

Use these questions for steps 3, 4, and 5 to debrief and process inventory activities.

Step 3: Share and Interpret Reactions to Inventories

- To what extent do these results accurately describe you?
- How consistent with your experience are these results?
- How do these inventory results surprise you?
- Which inventory results are significant?
- Do any of these results contradict your experience?

Step 4: Identify the Concept from the Inventory

- What is the benefit of knowing your type and the type of your subordinates?
- How can you integrate this new information into how you view your team?
- What did you learn about yourself that is significant?
- What is important for you to remember about these results?
- What areas of your work are most impacted by the inventory results?

Step 5: Apply What Is Learned from the Inventory

- How will you use this information to build rapport with your team?
- What are the consequences of ignoring this information?
- How will you use these inventory results?
- Based on these results, what changes will you make?
- What barriers will you address that were identified by these results?

Tool 6.2. Sample Inventory: Time Management Opinions

Common Time Management Issues

Directions: Place a number in the space at the left to indicate how often you do the following:

3 = lots 2 = sometimes 1 = not very often

_____ 1. Procrastinate
_____ 2. Do things that could be shared or delegated
_____ 3. Spend too little time in planning
_____ 4. Become too involved in details
_____ 5. Set too few goals and clear-cut objectives
_____ 6. Fail to prioritize projects appropriately
_____ 7. Allow telephone or visitor interruptions
_____ 8. Lack enough information from others to complete tasks
_____ 9. Spend too much time on personal phone calls and socializing
_____ 10. Deal with changing directions and/or deadlines
_____ 11. Say "yes" to requests when saying "no" is more appropriate
_____ 12. Lose time due to a disorganized work environment
_____ 13. Put out fires and deal with crises
_____ 14. Spend too much time doing or shuffling paperwork
_____ 15. Lose time due to poor communication or a misunderstanding
_____ 16. Work too much overtime; work too many hours
_____ 17. Fall behind on deadlines
_____ 18. Spend too much time traveling or moving from place to place
_____ 19. Start something new before finishing current project
_____ 20. Spend too much time waiting for equipment (computer, fax, copier, etc.)
_____ **Total number of points**

20 to 25 = things appear to be under control
26 to 40 = some real pressure points
41 to 60 = your stress must be evident (you came to the right workshop)

How Are Short-Answer Activities Facilitated?

Short-answer activities usually ask the learner to recall or identify specific and limited information that is used as the foundation for a discussion. Short-answer activities can involve writing an answer to a brief statement or scenario. See two types of short-answer activities in Tool 6.3. These can also be used to test a learner's knowledge. How to conduct and administer tests is discussed in Chapter 10.

Use the five steps of adult learning to facilitate short-answer exercises. In step 1, tell the learners the why, what, and how of the activity. Relate the purpose of the activity, what types of answers are expected, how long they will have to answer the questions, and whether the activity is done independently or with the help of others. In step 2, the learners complete their short-answer handouts. In step 3 learners share and interpret their reactions to the activity by discussing questions you pose. In step 4 learners discover the concept behind the activity, and in step 5 the learners apply what they discovered to their own situations. Use the questions in Tool 6.4 to facilitate short-answer activities.

What Techniques Are Used to Select and Facilitate Games and Simulations?

Many different types of games and simulations can be used during a training session. Consider using game formats from familiar quiz shows or board games. Most participants are familiar with the rules and with how these games are played. You can easily insert workshop content into this format. Some games are available on software; see the bibliography for references.

Once you have decided to use a game as a learning method, decide whether you will use an existing game and modify it or create a new game. When selecting a game, follow the suggestions in Tool 6.5.

If you decide to create a new game, see the suggestions in Tool 6.6.

Here are some game format and suggestions for the best uses of each format.

Quiz shows are active, participative games played by either individuals or teams modeled after familiar television game shows. The objective or purpose of quiz shows is to recall facts and information that learners will need to memorize, since use of a job aid is not realistic. Other objectives of quiz show games are to

Tool 6.3. Sample Short-Answer Activities

Scenario Short Answer

The first type of short-answer activity asks the learner to read a brief scenario and then identify the type of problem as either a "training" or a "non-training" problem and suggest one or more strategies that would be helpful in handling this problem learner situation. (Problem learner issues are more completely discussed in Chapter 13.)

Directions: Identify the cause of the learner's behavior as either a training issue (related to the content or process of instruction) or a non-training issue (related to issues outside your control), and then recommend one or two strategies to resolve the problem.

Side Conversations

You are conducting a session for experienced employees. At the beginning of each session in the morning and after the breaks and after lunch, two participants in the rear of the classroom continue their conversation several minutes into the class presentations.

Recall Short Answer

The second type of short answer activity asks the learners to write specific and limited information in response to a question.

Directions: To prepare for our discussion of problem learners, answer the questions below in your own words.

1. What type of problem learner is most difficult for you to handle comfortably?
2. What are some of the strategies you have used successfully to handle problem learners?
3. What types of strategies have not worked well for you in the past?

Tool 6.4. Questions to Facilitate Short-Answer Activities

Use these questions for steps 3, 4, and 5 to debrief and process short-answer activities.

Step 3: Share and Interpret Reactions to Short-Answer Activities

- Which of these questions were easy to answer?
- Which of these questions were difficult to answer?
- What surprised you about these short-answer questions?
- Which questions are significant to you?

Step 4: Identify the Concept from the Short-Answer Activities

- What is the benefit of clarifying your answers to these questions?
- How can you integrate this new information into how you view your work?
- What did you learn about yourself that is significant?
- What is important for you to remember about these answers?
- What areas of your work are most impacted by your answers?

Step 5: Apply What Is Learned from the Short-Answer Activities

- How will you use this information?
- What is the consequence of ignoring this information?
- Based on these answers, what changes will you make?
- What barriers will you address that were identified by these answers?

Tool 6.5. How to Evaluate and Select an Existing Game

1. What is your learning objective?
2. What is the sequence for the game with other materials?
3. What are the game's objectives?
4. Does the game simulate the learning point you want to make?
5. Are the instructions clear?
6. Are the rules the same as the way this game is usually played?
7. What is the setting or set-up for the game?
8. What materials are required?
9. What is the degree of risk for participants?
10. Is the payoff worth the time spent on the game?
11. Does the game suggest variations to include your group?
12. Will your learners be motivated to participate?
13. What are the prerequisites?
14. Is the complexity of the game process appropriate?
15. Are your skills adequate to process the results of the game?
16. Does the game require a referee, observer, or feedback?
17. What are the costs?

Tool 6.6. How to Design a Game Checklist

1. Write a behavioral objective.
2. Decide whether a game is the best method to meet the learning objective.
3. What kind of format for the game is best (puzzle, exercise, board game, etc.).
4. Review existing resources.
5. Follow selection/evaluation suggestions in Tool 6.5.
6. Write the learning point you want to make.
7. Identify the learners' motives to participate in the game.
8. Identify who would resist involvement in the activity. What is the source of the resistance and how will you overcome it?
9. Identify how much risk is involved for the learner.
10. Identify the instructions needed to introduce the game.
11. Identify characters, situation, or setting for the game.
12. Identify what participants DO to meet the objective (look at a picture, answer questions, discuss learning points, come to consensus, interview each other, write thoughts for reflection, etc.).
13. Write directions to read in class or for the learners to read themselves.

Tool 6.6. How to Design a Game Checklist, Cont'd

14. Estimate the time required to "play" the game sufficiently to develop learning points.

15. Is there a balance between learning and fun, and between skill and luck?

16. Make the rules clear and easy to follow. Define what a player can or cannot do, how a score is kept, and what constitutes winning the game.

17. Use tokens or game pieces that are familiar and easily available.

18. Write questions to process the game using the five steps of adult learning.

19. Estimate the time to process the game.

20. Obtain feedback on design of the game from peers.

21. Test run or pilot the game with target audience.

22. Evaluate to what extent the game objectives were met.

23. Identify learning points made that you did not anticipate.

24. Identify changes and/or variations for next time.

reinforce and review key points in a summary or update existing information as a session starter.

Examples, uses, and variations of quiz shows include recall or multiple-choice games like "Jeopardy," "Who Wants to Be a Millionaire," or "Hollywood Squares." These games can be played by individuals or teams. This format takes a lot of work to develop appropriate questions and answers. Common uses for these recall games include new employee orientation, policies and procedure training, and management training.

Board games like Bingo can ask employees to earn a space on a card by correctly answering questions or performing a skill. Board games are used to recall knowledge or demonstrate skills. For example, a card is drawn that directs a player to "do" a task such as format a disk in computer training or locate a fire extinguisher in an orientation session. Other objectives include applying new knowledge, learning new materials, or reinforcing learning principles during a summary of key points. Examples of board games include "Bingo," "Trivial Pursuit," "Monopoly," and "Tic-Tac-Toe."

Decision-making games and simulations imitate a real concept in a low-risk environment. They can be valuable training tools. Decision-making games are particularly good at helping learners identify their styles and skill in making business decisions. Decision-making games can focus on individual decisions or group decisions, quick decisions, or considered and studied decisions. Often learners follow their first instinct during such games. Debriefing discussions help the learners identify the difference in results between following a first instinct or learning new decision-making skills.

Objectives and learning points taught by decision-making games include identifying the value and validity of individual decisions versus group decisions; identifying the difference between quick versus considered decisions; predicting how one acts during a crisis; and looking for competencies within a group. Decision-making games can be used in team building, supervisory training, and interpersonal skills classes. Examples of decision-making games include Marooned[5] or Outback[6] and Clue. The Dirty Dozen, shown in Exhibit 6.1, is a decision-making game.

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[5]HRDQ, King of Prussia, PA www.hrdq.com

[6]HRDQ, King of Prussia, PA www.hrdq.com

Exhibit 6.1. The Dirty Dozen

When the directions are given, underline the correctly spelled word.

Round 1

1. similar/similiar
2. admissible/admissable
3. miniture/miniature
4. rebuttle/rebuttal
5. cooly/coolly
6. massacre/massacer
7. suffrage/sufferage
8. ukulele/ukelele
9. heroes/heros
10. quizzes/quizes
11. restaurant/restraunt
12. hitchhiker/hitchiker

Round 2

1. cemetery/cemetary
2. hypocrisy/hypocracy
3. sieze/seize
4. nickle/nickel
5. liquefy/liquify
6. alright/all right
7. asinine/assinine
8. apparrel/apparel
9. pavilion/pavillion
10. occasionally/occasionaly
11. parallel/paralell
12. alotted/allotted

Game Directions

Purpose: The following exercise teaches essential components of *group decision making.*

1. *Instructor sets up the learning activity.* Have the participants get into groups of *at least* three. Round 1 needs to have a sense of rush and urgency. Get them together quickly and keep participants standing up.
2. *Learning activity, Round 1.* Participant groups have twenty seconds to decide which word in the pair of words is correctly spelled. After twenty seconds, call time and give the correct answers. Ask each group to report its score.

   Round 2. Allow two minutes for the groups to come to a selection of the correct answer. Most groups will not need this long, but ask them to take the full amount of time. After two minutes, call time and give the correct answers and record scores.
3. *Learners share and interpret their reactions to the activity.* Ask each group to list three things they did differently in their group between Rounds 1 and 2. Ask for group reports. Compare scores in the two rounds by asking which round had better results? How do group members feel about how the decisions were made each time?
4. *Learners identify concepts from their reactions.* Ask participants to move away from the word lists and discuss and list critical elements in *group decision making* learned from their group processes. You may want to involve the group in a discussion of successful versus effective decision making. Successful decision making means the group found the right answer. Effective decision making means everyone in the group felt good about the process. Discuss which focus is better for the objectives of the group—quick, correct decisions or long-term relations in a work group.
5. *Learners apply concepts to their situation.* Have participants write how they can use the new information and the concepts learned. Discuss, in the large group, application ideas and action items to relate the learning to the work environment.

Tool 6.7 is a list of questions to process games and simulations through adult learning steps 3, 4, and 5.

Tool 6.7. Processing Questions for Games and Simulations

Use these questions for steps 3, 4, and 5 to debrief and process games and simulations.

Step 3: Share and Interpret Reactions to Games and Simulations

- What helped you to be successful?
- What held back your progress?
- What surprised you about this game?
- Which results are significant?
- Was there a turning point in the game?

Step 4: Identify the Concept from a Game or Simulation

- What is the point that this game teaches
- How can you integrate this new information into how you view your team?
- What did you learn about yourself that is significant?
- What is important for you to remember about how the game was played?
- What areas of your work are most impacted by the results of this game?

Step 5: Apply What Was Learned from the Game or Simulation

- How will you use this information to build rapport with your team?
- What are the consequences of ignoring this information?
- To what extent does this game reflect your work life reality?
- How will you use the results of this game?
- Based on what you learned about yourself and your team from this game, what changes will you make?
- What barriers will you address that were identified by the game?

The use of inventories, short-answer activities, games, and simulations increases participation and learning retention. Since these types of activities can be time-consuming, practice playing the game, practice giving instructions and answering questions from learners about the game, and make sure the rules are clear and can be followed easily. If one of your preferred trainer styles (see Chapter 2) is the *explorer,* you may enjoy facilitating games. If the *explorer* is not your preferred style, it may take added patience and a willingness to tolerate mistakes and a bit of chaos to extract learning from a game.

The next chapter focuses on how to facilitate case studies to increase participation and improve learning retention.

CHAPTER 7

How to Facilitate Case Studies

Chapter Objectives

- To learn about five types of case studies
- To learn how to lead productive discussions of case studies

Tool

- Processing Questions for Case Studies

Chapter Questions

- What is a case study?
- What are the five types of case studies?
- What are the benefits of using case studies?

What Is a Case Study?

A case study is a description of an actual or made-up situation, which learners examine to increase their knowledge and skills or to influence their attitudes. Trainers choose case studies to present issues similar to the issues the learners are likely to encounter when trying to apply new knowledge and skills following a training program. A case study may be a paragraph, a page, or several pages in length. The amount of detail provided depends on the purpose of the case. A case study brings an element of realism to help the learners learn how to use and apply knowledge and skills. Case studies provide practice in diagnosing and solving problems and give ways to apply newly learned knowledge and practice skills.

What Are the Five Types of Case Studies

Typically, case studies are written for one of five purposes. These types of case studies are

1. *Identification:* This type of case study is appropriate to help learners identify both positive and negative characteristics of a situation. As part of the learning process, learners are asked to find points similar to those that may be present in their own work lives. These provide a safer way to identify the characteristics or points from the case that they find in themselves.
2. *Problem Solving:* This type of case study helps the learners use systematic and creative problem-solving techniques. Problem-solving case studies can be used to have learners solve an entire problem using a specific problem-solving model or to have learners focus on any part of the problem-solving process, such as finding a solution or clearly identifying the problem.
3. *Practice:* This type of case study helps learners think about and use a new idea or try out a skill in a safe setting before using it in the real world. These case studies can also be used to help learners explore and clarify their attitudes about specific issues.
4. *Application:* This type of case study is often used at the end of a training program to summarize and review a set of complex ideas and skills presented during the program. Different elements of the case can address

how the complex ideas that were learned are interrelated, as well as show how to overcome obstacles to using new ideas and skills back on the job.

5. *Serial:* This type of case study uses an initial situation or set of characters and progressively adds new elements for the learners' consideration. Some of the elements from the above four types of cases may be used at different times during the workshop, but a serial case study can save time since learners already understand the background of the case and can focus on the new element, idea, or skill being introduced. Another type of serial case study uses the same situation throughout and asks the learners to apply different tools and skills.

What Are the Benefits of Using Case Studies?

Case studies are often used in a training setting to add a note of realism and practicality, as well as to increase learner participation, enjoyment, and retention. A case study allows learners to practice or rehearse how to handle a new situation in a low-risk setting. Case studies are beneficial and successful when they:

- Allow learners to discover new concepts
- Are non-threatening
- Build on past experiences

Frequently, adult learners enjoy discovering new concepts by arriving at their own conclusions, rather than being told what to think or do and how to do a task. Learners are more likely to use and apply new concepts when they have studied and considered a situation and independently arrived at a conclusion. Often, by discussing a case study, adult learners will change their minds and allow themselves to be influenced by peers. Ownership of an idea is more likely to occur when it is discovered, rather than heard from a trainer.

Case study situations can be a low risk or non-threatening method for adults to learn from past experiences, apply new knowledge or skills, and even rehearse or practice how to effectively change their behavior. With a case study, adults are not put in the awkward position of defending poor past practices. There is little risk in discussing a new idea or new method of doing a task when looking at a case.

Adult learners use their past experiences as a filter through which they learn new knowledge and skills and consider altering their attitudes. Mature or experienced learners who have been doing a specific task in a particular way (even incorrectly) prefer to learn through experience, rather than being told directly that they are doing something wrong. A case study allows them to reach their own conclusions and to apply past learning to a solution.

Cautions

An effective case study must be realistic and authentic. The situation must be believable and parallel to learners' situations. A case study needs to be authentic, but not so close to reality that the learners can identify specific co-workers or organizational folklore in negative situations. However, if a case is not at all authentic or realistic, participants may argue with the details of the case and miss the major learning points.

Examples of the Five Types of Case Studies

The next few pages show examples of the five types of case studies described above. For each case study, the purpose is given, followed by directions to the learners and questions to consider, explore, and discuss following independent reading of the case.

At the end of each case are questions for you to ask as you lead a discussion of that particular case. These questions are designed to complete the learning process by helping learners identify the concepts and apply what was learned.

Following the five case study examples is Tool 7.1, which is a template of questions to process case studies using the five steps of adult learning.

CASE STUDY 1: TEAM DEVELOPMENT IDENTIFICATION

Make Strengths Productive

Directions: Read the following situation and decide

1. What are the team leader's strengths?
2. What could an assistant do to support the team leader?

Bob Bright, the team leader, has an MBA and is an extremely intelligent person who becomes very impatient with people who do not get right to the point and state things in concise terms. When he is assigned to lead other staff members on a project, there seems to be a complete lack of cooperation by all concerned. Bright works very well on his own and needs no supervision. Bright is often late for work, yet does not mind staying late to finish a project or meet a deadline. Bright is often recognized as the expert in the department and has gained the respect of upper management. Bright sometimes has difficulty getting along with peers. Bright has been known to bark a few orders at others and has little tolerance for mistakes. There is never a dull moment in this busy office.

Facilitator Notes for Case Study 1

Learning Objective: Given an identification case study and using their own experiences, the learners will identify the team leader's strengths and supportive behaviors for the assistant.

Possible Case Answers

1. What are the team leader's strengths?
   - Intelligent and department expert
   - Works well independently and needs no supervision
   - Willing to work beyond normal hours
   - Respected by upper management
2. What can the assistant do to support the team leader?
   - Be organized and anticipate deadlines
   - Check work to identify errors before Bright sees the work
   - Be the buffer between Bright and other team members
   - Identify ways to promote cooperation with Bright's peers

Facilitator Processing Questions and Possible Answers

Q: What team management concepts are working well for this team?

A: The team's work is completed on time and is correct. Upper management seems to like the results.

Q: How likely is it that the assistant can change the team leader's behavior?

A: Not very likely. It would be within the assistant's control to focus on what the assistant can do to support the team.

Q: What are the positive behaviors of *your* team leader, and what can you do as the assistant to support *your* team?

A: Answers will vary depending on the team.

CASE STUDY 2: TEAM DEVELOPMENT PROBLEM SOLVING

Software Solutions

Directions: Identify the issues that would impact this assistant's productivity.

Linda is an executive assistant who has been hearing complaints from other assistants about an uneven workload. Since the company was founded five years ago, the computer software purchases have been made by department heads or their support staff. Although many departments must interact to accomplish their goals, there has been little coordination of the selection or the type of software chosen by each department.

Linda has become aware that there is a duplication of effort when transferring files between different types of software among the departments. Assistants are also transferring files when doing the work of those who are absent in their own departments. Due to the nature of the work done in different departments, there are peaks and valleys in the workload. It is possible that some work projects could be shifted to related departments. However, this is not occurring. Complaints are coming from internal customers and from the support staff about missed deadlines and how work is distributed.

Facilitator Notes for Case Study 2

Learning Objective: Given a problem-solving case study and using their own experiences, the learners will identify problems that impact the assistant's productivity.

Possible Case Answers

1. Identify the issues that impact this assistant's productivity.
   - Lack of a centralized purchasing system
   - Lack of interdepartmental scheduling and planning
   - Duplication of work in separate departments
   - Complaints from other teams and one's own team members

Facilitator Processing Questions and Possible Answers

Q: How would centralized planning or interdepartmental planning help the productivity of assistants?

A: The assistant's workload would be more even. Departments with shared projects would work more efficiently by using the same software. Duplicate work could be avoided and complaints reduced.

Q: What does good interdepartmental cooperation look like?

A: Each department is aware of its impact on another and plans to mitigate negative impacts. Duplicate work is avoided or eliminated, and instead of complaining, team members focus on solving problems.

Q: How can *our* organization improve interdepartmental cooperation?

A: Answers will depend on the participants' experiences.

CASE STUDY 3: TEAM DEVELOPMENT PRACTICE

Team Meeting Management

Directions: Angela is the team leader and needs to practice starting meetings. What skills does Angela need to practice to begin meetings more effectively? What does she need to say and do?

Angela is conducting a day-long team meeting for her team of twelve production workers. At the beginning of the session in the morning, after the breaks, and after lunch, two members in the rear of the room continue their side conversation several minutes into the team's meeting. At other times during the meeting these two team members, who are good friends outside of work, whisper side comments to each other. These comments do not go unnoticed by the rest of the team. In reaction to the side comments, one team member stares pointedly at the two disruptive team members and another team member gets up from the meeting table to get more coffee. Angela feels the group slipping away from her and is concerned about the productivity of the meeting and getting the group to focus on operational problems.

Facilitator Notes for Case Study 3

Learning Objective: Given a practice case study and using their own experience, the learners will identify the skills that need practice and what the team leader needs to do and say to improve the productivity of team meetings.

Possible Case Answers

1. What skills does Angela need to practice to begin meetings more effectively? What does she need to say and do?
   - Have the group set ground rules. Say something like, "To help us accomplish what we need to do today, let's agree on some ground rules for how each of us will participate, what the role of each team member is, and how we will record the team's suggestions. I'll write your suggested ground rules on this flip chart."
   - Redirect the focus of the group away from the two team members having a side conversation. Say something like, "We have heard some ideas from a few members of the group. I'd like you to work in three teams of four and take ten minutes and evaluate the two ideas we have recorded on the flip chart."
   - At the beginning of the next break, talk to the two disruptive team members away from the rest of the group. Say something like, "When you have returned from the break, I noticed that your private conversations have continued into the team's meeting time. If what you are discussing would help the team, please share it with the rest of us. If you are having a personal conversation, please put it aside when you come back into the room. May I have your cooperation?"

Facilitator Processing Questions and Possible Answers

Q: What is the best way to set ground rules for team meetings?

A: This needs to be a shared process that is revisited at the beginning of each team meeting.

Q: What is difficult about getting team members to abide by ground rules? What can be done to make this task easier?

A: No one likes to be a disciplinarian. Team leaders who can redirect the attention of those engaging in side conversations or speak to them away from the group, rather than being confrontational, are more likely to gain cooperation.

Q: Which team leader skills do you need to practice? How can you get feedback to develop your skills?

A: Answers for which individuals need skill practice will vary with each person. One way to obtain feedback on skill development is to ask for feedback directly from the team, or ask a peer team leader to sit in on a meeting and offer feedback and suggestions following the meeting.

CASE STUDY 4: FACILITATION APPLICATION[1]

Facilitate Meetings with Ease

Directions: Read the list of ten facilitation skills below and then identify which skills the facilitator in the case study applies well and what he can do to improve the effectiveness of these techniques.

Ten Facilitation Techniques

1. Initiate, propose, and make suggestions.
2. Divide into subgroups.
3. Use questioning to draw people out, elicit information and opinions.
4. Use silence to make space.
5. Keep track of multiple topics and build on the ideas of others.

[1]From *Instant Case Studies* by Jean Barbazette (pp. 211–216). San Francisco: Pfeiffer, 2003. Used with permission.

6. Use flip charting to generate additional discussion and record ideas.
7. Listen for common themes, bar irrelevant details. and redirect discussion.
8. Organize the sequence of speakers.
9. Paraphrase to clarify or show understanding.
10. Have group members relate specific examples to a general idea or make a summary.

Tim, the lead person on his shift, has been a quality improvement facilitator for a year. He attended facilitator training as part of the company's effort to make quality control everyone's job. After some difficult team meetings in the first six months, Tim's group has come together to solve most of its problems.

Tim's company manufactures and distributes laboratory hardware that analyzes body fluids. The emphasis in past meetings of Tim's work group has been discussion on ways to improve the testing and inspection process at different points of manufacture. The group has successfully implemented a number of improvements. The current discussion is about formalizing a troubleshooting process that all team members will use. Team members at today's meeting include:

- Barbara, the newest technician and recent college graduate
- Paulo, a senior technician with the most seniority at the company
- Nhung, an experienced technician without formal education and a natural at problem solving, software issues, and troubleshooting
- Dan, a dominant and outspoken technician who resents not being the team leader

Tim: "Okay, let's get started. We have a partially completed troubleshooting flowchart on the board. I'd like to finish the process charting in the next hour. This is the only item on our agenda. How does that sound to the rest of you?"

Dan: "I guess that's okay; but I think you have a problem at point five on the chart. We ought to fix that before we try to finish the rest of the process."

Tim: "Dan, that's not my memory of how we ended last time. If you have some suggestions about point five, we can start there. Any other suggestions?"

Barbara: "Tim, do you want me to chart and take notes during the meeting?"

Tim: "Yes, thanks, Barbara. You did a great job at the last meeting capturing everyone's ideas. Here are copies of Barbara's notes from the last meeting." (Tim distributes notes from the last meeting.)

Paulo: "Dan's right. We will be more successful if we fix point five first. I've been thinking about it and drew up two options for it. Let me show it to you and see what the rest of you think." (Paulo explains his suggestion for the next five minutes. Paulo answers questions from the rest of the group. Tim has not offered any comments and only organizes the sequence of speakers when more than one team member wants to speak at the same time. Barbara is charting questions and summarizes points in writing for all to see.)

Tim: "Nhung, you've come up with an interesting change to what Paulo is suggesting. What do the rest of you think about it?" (The others concur with Nhung's suggested change.)

Tim: "Barbara, you've been pretty quiet so far. It looks like you're getting all this down. Do you have any questions? I don't want you to feel left out."

Barbara: "No, I don't have any questions. Much of what you are discussing is similar to what I studied in school. It's interesting to see what goes on in the real world. It's intimidating to see how theoretical much of my academic work has been. Here, we see how what we do affects the test on real patients. When I completed lab work at school, fluids were made-up numbers since we were never working with real patients and our software makes the process much easier than the manual troubleshooting we had to do."

Tim: "Barbara, now that we have fixed point five, what do you think the next step ought to be in the troubleshooting process?"

Barbara: "Well, I'm not sure, but my guess is we need to divide the field in half and begin testing at critical junction points."

Nhung: "Good guess, Barbara. You did learn something in school, but I see one software issue none of us has addressed."

Tim: "Let's summarize what we have so far and then we'll look at the software issue." (Nhung makes a summary from Barbara's charting. Tim asks for consensus, and the group agrees after some discussion of a minor point.)

Tim: "We're just about out of time. I'm disappointed we didn't finish the process today. However, we did refine the process and we all agree on it so far. Nhung, would you send us an email with the software issue? I'd like the rest of you to consider it before we meet again on Friday. Dan and Paulo, I'd like the two of you to meet before Friday and develop a draft of the rest of the process. Your two options on point five really helped us today."

Identify which of the ten skills Tim, the facilitator in the case study, applies well and what he can do to improve the effectiveness of these techniques.

Facilitator Notes for Case Study 4

Learning Objective: Given a case study and ten facilitation techniques, the learners will identify how a facilitator applies each technique and make suggestions where application falls short.

Possible Case Answers

Here are the ten facilitation techniques. Table 7.1 below shows what Tim does well and what he can do to improve.

Table 7.1. Assessing Tim's Facilitation

Technique	What Was Done Well	What Can Be Improved
Initiate, propose, and make suggestions	He gets the group off to a good start and summarizes well.	He could have handed out the notes from the last meeting sooner. He didn't wait for a response from the group before ending the meeting.
Divide into subgroups	This is done at the end and might work well.	Tim could have used this technique during the meeting to accomplish more.
Using questions to draw people out, elicit information and opinions	This worked well with Barbara.	Dan was ignored for most of the meeting.
Use silence to make space	Not able to observe.	
Keep track of multiple topics and build on the ideas of others	Tim seemed to do well by keeping the agenda, diverting to point five, and pulling the group back together.	
Use flip charting to generate additional discussion and record ideas	Tim had Barbara record ideas.	Be sure a designated recorder captures all ideas and not just personal views.
Listen for common themes, bar irrelevant details, and redirect discussion	Tim was accepting of ideas from others.	Tim was unable to reach the objective of the meeting.
Organize the sequence of speakers	Tim did this well.	

Table 7.1. Assessing Tim's Facilitation, Cont'd

Technique	What Was Done Well	What Can Be Improved
Paraphrase to clarify or show understanding	He acknowledged and thanked others, but didn't actually paraphrase.	Paraphrasing the ideas of others would improve clarity and understanding.
Have group members relate specific examples to a general idea or make a summary	This seemed to flow well in the meeting without much direction from Tim. He also asked others to make a summary, which is an inclusive behavior.	

Facilitator Processing Questions and Possible Answers

Q: Which of the ten techniques seems the easiest for this facilitator to apply?

A: The techniques that seem easiest to use are initiate, propose and make suggestions, divide into subgroups, keep track of multiple topics and build on the ideas of others, use flip charting to generate additional discussion and record ideas, organize the sequence of speakers, have group members relate specific examples to a general idea or make a summary.

Q: Which of the ten techniques seems the most difficult for this facilitator to apply?

A: The techniques that seem the most difficult to use are questions to draw people out, elicit information and options, listen for common themes, bar irrelevant details, redirect discussion, and paraphrase to clarify or show understanding.

Q: What makes these techniques more difficult to apply?

A: These three techniques are more difficult because it requires the facilitator to have great awareness and track contributions by everyone. While listening, the facilitator must judge the contributions of others and paraphrase them for clarity. It does require thinking and doing more than one thing at a time.

Q: What are the benefits of using facilitation techniques, even though they might be difficult to apply?

A: The benefit of using these facilitation techniques is to encourage the group to participate and offer ideas. The key role of a facilitator is to meet the objective and involve the best thinking of the group.

Q: Which facilitation techniques do you need to work on to gain the benefits identified in the previous question?

A: Answers to this question will vary with each learner.

Team Development Serial Case Studies

Each of the four previous case studies in this chapter addresses a different aspect of team development. The team leader is faced with different issues in each case study. Taken together, each case study can build on the last to be used as a serial case study during the same workshop. The first case helps identify effective team leader support techniques. The second case addresses interdepartmental teams. The third case helps a team leader handle problem participant behaviors using distinct strategies and a variety of tactics. The fourth case study helps a facilitator apply ten meeting facilitation techniques. After using all four of these case studies, ask the following questions.

Facilitator Processing Questions and Potential Answers

Q: What have you learned about effective team leadership from these four case studies?

Q: What barriers do you face in using the team leader techniques suggested in these case studies?

Q: How will you overcome these barriers?

Q: Which of these facilitation techniques require further development for you to feel more comfortable facilitating team meetings?

Q: How will you continue your development as a team leader?

A: Answers to these questions will vary with each participant.

Tool 7.1 provides questions that can be used to process any case study through the five steps of adult learning.

In the next chapter we discuss how to facilitate role plays.

Tool 7.1. Processing Questions for Case Studies

Use these questions for steps 3, 4, and 5 to debrief and process games and simulation.

Step 3: Share and Interpret Reactions to Case Studies

- What helped you to be successful is solving the case study?
- What did you learn about the skills that were described or missing in the case study?
- What skills or techniques are easy or difficult to use?
- Which is significant about the case studies you reviewed?
- What problem-solving skills did you use in working on this case?

Step 4: Identify the Concept from a Case Study

- What is the point that this case study teaches?
- How can you integrate this new information into how you view your team?
- What did you learn about yourself that is significant?
- What is important for you to remember about the learning points in this case study?
- What areas of your work are most impacted by what you learned in this case study?

Step 5: Apply What Is Learned from a Case Study

- How will you use this information to build your skills?
- What is the consequence of ignoring this information?
- To what extent does this case study reflect your work life reality?
- How will you use what you learned from this case study?
- Based on what you learned about yourself and your team from this case study, what changes will you make?
- What barriers will you address that were identified in the case study?

CHAPTER 8

Facilitate Role Playing for Success

Chapter Objectives

- To study two purposes of role play: empathy and skill practice
- To learn options for setting up role plays
- To learn how to avoid high-risk situations

Tools

- Sample Empathy Role Play
- Debriefing Questions for Empathy Role Plays
- Sample Skill Practice Role Play: Training Manager's Role
- Sample Skill Practice Role Play: Instructor's Role
- Debriefing Questions for Skill Practice Role Plays
- Sample Observer's Sheet

Chapter Questions

- What is the purpose of a role play?
- How are the five steps of adult learning used to ensure a successful empathy role play?
- How can the five steps of adult learning be used to ensure a successful skill practice role play?
- What are some variations on conducting role plays?
- How can problems in facilitating role plays be avoided?

What Is the Purpose of a Role Play?

A role play is a training method that allows learners to practice skills or to empathize with another's situation by acting out a prescribed role. The purpose of a role play is to *develop empathy* or to *provide skill practice.* The most effective role plays are conducted in groups of three to build on the practice element. The instructor and/or peers observe participants and give feedback to promote learning and application of skills on the job. Skills practice in small groups can reduce the learners' risk when participating in this type of activity. Some trainers and learners have strong concerns and fears about exposing their lack of skill in front of others. Reduce that risk by only using role plays to build skills and/or to increase empathy. Appropriately preparing and staging role plays can also reduce risk for participants.

How Are the Five Steps of Adult Learning Used to Ensure a Successful Empathy Role Play?

During step 1, set up the learning activity by telling the learners that the purpose of the role-play activity is to learn to empathize with another's point of view. It is helpful for learners to review written directions to prepare their roles. (See the directions in Tool 8.1 for a sample empathy role play.) Next identify how the role play is structured and assign learners the characters they will play. Tell participants how much time is available to prepare to play a specific character.

Depending on the complexity of the various roles, learners might need time to rehearse or prepare for their roles. For complex characters, try having all the participants assigned to a specific role meet together for five minutes and brainstorm what approaches they might take. During this time, ask the learners playing the other roles to identify what they will do to keep the roles realistic and decide how they will react to the person playing the main role. Also, have the observers meet together and determine how they will perform in that role and things they will look for.

During step 2, participants play their roles. Keep track of the time allowed for each part of the discussion. When time has expired, ask participants step 3 questions such as those listed in Tool 8.2 for empathy role plays.

The next step is to reverse roles. Return to step 1 and reassign roles. For empathy role plays, participants will not need very long to prepare. Debrief the role play with step 3 questions. Since there are three roles (customer, clerk, and observer) return to step 1 again and reassign the final roles, again allowing enough preparation time. Once the final roles have been played, ask learners to share and interpret their reactions to what occurred in the role play by asking step 3 questions.

Next proceed to step 4 to identify the concept behind all three of the role plays. What feelings were the clerks to empathize with? (See the sample questions in Tool 8.2.) Finally, discuss step 5 and ask participants how they will use what they have learned through empathizing. (Step 5 questions are in Tool 8.2.)

Tool 8.1. Sample Empathy Role Play

Directions: The purpose of this role-play exercise is for you to experience the customer's feeling of frustration. You will play one of three roles described below. When you are asked to conduct the role play, conduct a two-to-three-minute conversation according to the directions given below.

Customer: You are looking for a product you heard advertised on the radio. It was described as a machine that slices and chops all kinds of food. You have been walking around the store and are unable to locate the product. You see a clerk stocking a shelf and decide to ask her/him. Be persistent.

Clerk: It is very important to finish stocking this shelf so you can leave work on time in ten minutes. The last thing you want is an interruption. Do everything you can to get rid of the customer who is approaching you so you can finish stocking the shelf.

Observer: Your task is to watch and listen. Do not interfere in the conversation you will observe. Watch for signs of frustration and anger from the customer. What does the clerk say and do that causes frustration?

NOTE: We realize that this is an artificial situation and that you would not treat a customer as you are asked to for this role play. The more you act out your character's role, the better the learning experience for all of you.

Tool 8.2. Debriefing Questions for Empathy Role Plays

Step 3: Share and Interpret Learners' Reaction to Role Play

- Was the customer able to get the clerk to do what he/she wanted?
- What emotions did the players display during the role play?
- What did you notice about the customer's level of frustration?
- What behavior on the clerk's part caused these reactions?
- Was there a turning point in the conversation? What was it? How was that significant?
- What is the consequence of the employee's behavior?

Step 4: Identify the Concept from the Role Play

- How do customers (others) expect to be treated?
- What disappoints or turns off our customers?
- How can we avoid losing customers?
- What did you learn from this role play that you want to remember?
- What does excellent customer service look like?

Step 5: Apply What You Learn from the Role Play

- What gets in the way of treating our customers as they expect to be treated?
- What can each of us do to improve customer service?

How Can the Five Steps of Adult Learning Be Used to Ensure a Successful Skill Practice Role Play?

During step 1, set up the learning activity by telling the learners that the purpose of the role-play activity is to practice a skill. It is helpful for learners to review written directions to prepare for their roles. (See Tools 8.3 and 8.4 for directions for a skill practice role play.) Next identify how the content of the role play is structured as well as assign characters they will play. Tell participants the role plays will be completed in triads and how much time is available to prepare to play a specific character.

Note that in skill practice role plays, it is customary for each person to prepare for a role without knowing the directions for the other role. For example, the manager in Tool 8.3 is given one set of instructions and the instructor in Tool 8.4 is given a separate set of instructions. Neither character will see the other's instructions until step 3 in the adult learning process. The observer will read both roles and be asked to make notes on the observer's sheet. A sample observer's sheet is in Tool 8.6.

During step 2, participants play their roles. Keep track of the time allowed for each part of the discussion. When time has expired, ask the observers in each triad to conduct a debrief discussion. First have the two characters read each other's instructions. Next, have the observer ask step 3 questions such as those listed in Tool 8.5 for a skill practice role play.

The next step is to reverse roles two times and give the instructor and the observer opportunities to practice paraphrasing and questioning skills. Return to step 1 and reassign roles. For skill practice role plays, introduce new descriptions of the instructor and manager roles and allow enough time for each person to prepare to play his or her role. Have the observer debrief the role play by having the characters read each other's roles and then discuss step 3 questions. Since there are three roles (instructor, manager, and observer), return to step 1 for a third time and reassign the final roles. Again allow enough preparation time for reviewing the new role instructions. Once the final roles have been played, ask the observers to once again have the characters read each other's instructions and then share and interpret their reactions to what occurred in the role play using step 3 questions. Now it is time to bring the class back together in one group. Ask the step 3 questions so that the learners understand that not all the triads had the same experience.

Next proceed to step 4 to identify the concept behind all of the role plays. What did the manager learn about paraphrasing and asking questions? (See the sample questions in Tool 8.5.) Finally, discuss step 5 and ask participants how they will use what they have learned from the skill practice role plays.

Tool 8.3. Sample Skill Practice Role Play

Training Manager's Role

Directions: The purpose of this role play is to practice paraphrasing and asking open and closed questions appropriately. To prepare, review course materials on different ways to paraphrase. Be sure to paraphrase the instructor's ideas to show that you clearly understand what is said. Write some open and closed questions to help you clarify your understanding of what the instructor wants to do and why these changes might be appropriate. Coming to an agreement may be appropriate in the role play, but only after you clearly understand the requested changes and reasons behind them.

You are the training manager in a telecommunications company that sells and services telephone systems and equipment. One of the new classes offered by your department trains customer service representatives in telephone techniques. Customers who call are frequently trying to troubleshoot problems with their systems.

One of your instructors has taught this workshop four times over the past two months. The instructor has asked to discuss some changes in the course methods and activities with you. You are not sure what types of issues to anticipate since no one else has questioned the course methods and activities.

Tool 8.4. Sample Skill Practice Role Play

Instructor's Role

Directions: To prepare for this role play, write down some specific examples for one or two of the points below. You will *not* have time to cover all four points. The purpose of this role play is for you to practice applying some of the ideas presented during the workshop.

You are an instructor who teaches a "telephone techniques" course to customer service representatives. The course covers policy and procedure as well as teaches troubleshooting and service skills for your company's products. After teaching this workshop four times during the last two months, you have some suggestions on how to improve the workshop. Take a few minutes to prepare for your discussion with your training manager. Here are some of your concerns:

1. There is too much lecture in the first hour, which covers only policy and procedure. You would prefer beginning with a more exciting activity.
2. The directions to instructors in the leader's guide are unclear for two exercises on active listening and tone of voice. This has caused some confusion when introducing some of the exercises to the learners. The purpose of these exercises is not clear to you, so it is difficult to guide the learners.
3. You would prefer to have more hands-on practice in using the telephone equipment. The employees who use the telephone have only a basic "understanding" of advanced features. You are not sure they can apply this understanding when they need to answer the customers' questions.
4. The handout page on "Active Listening" focuses on nonverbal behavior such as eye contact and nodding. This information seems inappropriate and confusing for those working on the telephone.

Tool 8.5. Debriefing Questions for Skill Practice Role Plays

Step 3: Share and Interpret Learners' Reactions to Role Play

- What was positive or done well by the manager in using paraphrase to demonstrate understanding?
- What was positive or done well by the manager when asking open and closed questions?
- What was interesting about this manager's approach to paraphrasing and questioning?
- What was the instructor's reaction to the paraphrasing and questions from the manager?
- What could the manager do differently next time to get a better result?

Step 4: Identify the Concept from the Role Play

- How do subordinates respond when managers paraphrase their suggestions?
- What are characteristics of well-worded closed questions?
- What are characteristics of well-worded open questions?
- What enabled the instructor and manager to gain agreement?
- What frustrated the instructor and manager from gaining agreement?
- What did you learn from this role play that you want to remember?

Step 5: Applying What You Learned from the Role Play

- How will you use paraphrase in the future to demonstrate clarity of understanding?
- How will you use questions to apply what you have learned?

Tool 8.6. Sample Observer's Sheet

Directions: Read both roles and think about the skills to practice that you will observe. Use these labels for each skill:

P = positive
I = interesting
N = next time

Paraphrases by
____ making a general comment
____ making a specific comment or example
____ asking a question

Asks closed questions appropriately by
____ asking "yes-no" questions
____ asking selection (either/or) questions
____ asking for specific limited information

Asks open questions appropriately by
____ asking for the other's opinion
____ asking for objective information
____ asking a problem-solving question

Use these debriefing questions to lead a discussion in your triad after the role play is completed.

- What was positive or done well by the manager in using paraphrase to demonstrate understanding?
- What was positive or done well by the manager when asking open and closed questions?
- What was interesting about this manager's approach to paraphrasing and questioning?
- What was the instructor's reaction to the paraphrasing and questions from the manager?
- What could the manager do differently next time to obtain a better result?

What Are Some Variations on Conducting Role Plays?

The recommended format for empathy and skill practice role plays is to conduct them in triads throughout the room, not as a fishbowl, with observers taking notes to give feedback. Conducting role plays in triads allows maximum practice for all participants, while reducing the risk of making embarrassing mistakes in front of the larger group. Here are some other options to conducting role plays and when each might be appropriate.

Conduct role plays in a *one-on-one* setting without an observer. This type of role play might be appropriate for an empathy role play because each party to the discussion can easily recognize the emotions and feelings that arise. For best results in skill practice role plays, use an observer.

Conduct role plays using an *alter ego* with a person standing behind each of the players whispering suggestions or next steps for the character to try out. This type of role play can be helpful to take skill practice role plays to the next level.

Conduct the skill practice role as a "fishbowl" in front of the class with a separate group of observers who can act as a "help desk" during the skill practice. Be sure to get true volunteers who are willing to practice in front of the group. The focus of all "fishbowl" role plays needs to be on what the participants are learning from how the roles are acted out.

Conduct the skill practice role play using random tagging when the practice is faltering. Each of the players who is in a "fishbowl" can tag an observer to take over when or if he or she gets stuck. Observers can also tag in if they are dying to say something by saying, "Tag, you're out" to one of the players.

Each of these variations requires a facilitator who can explain the directions and the process for a particular role play, as well as ask all the debriefing questions needed to get the learning from the role play.

How Can Problems in Facilitating Role Plays Be Avoided?

A skilled facilitator of role plays is aware of the risk factors of participant skill practice, especially when role plays are conducted in front of the class, rather than in triads. To avoid the risk factor, conduct role plays in triads, unless you take the precaution of getting true volunteers who are willing to perform in front of the group. You also need to understand how to ask questions that promote reflection and learning, rather than focus on the behavior of the volunteer players.

Above all, show empathy for the learners who have concerns about practicing in front of others. Identify the benefits of using this learning technique and make the environment safe, not embarrassing for the learner, by using the suggestions in this chapter.

Additional suggestions to make role plays a lower-risk activity are to give participants an opportunity to rehearse their roles. Begin by making a skill practice role-play situation a case study. Have the participants look at the situation and identify what the person in the case study can do and say to handle the situation successfully. For example, in a performance appraisal workshop, managers often fear discussing critical ratings with a subordinate. Present this situation in a case study. Have participants discuss options to present critical information in a factual manner. Brainstorm a list of suggestions to overcome the subordinate's weaknesses. Discuss options to handle an upset or angry subordinate who might become defensive. Transition to the role play by dividing the class into three groups: managers, subordinates, and observers. Ask the groups to jointly prepare for their roles. Ask participants to take and use fictitious names for their characters. As the facilitator, listen to how the groups are preparing for their roles and offer suggestions, if needed. Re-sort the participants into groups of three. Ask the managers to practice discussing critical information and making suggestions. Ask the persons playing the subordinates to become upset. If everyone in the role plays knows that this behavior is expected, the skill practice is about dealing with a subordinate's upset or anger, not about overcoming surprise at this behavior.

After the role play is finished, tell the characters to return to their own identity and that the characters from the role play may no longer speak. This helps the learners get out of their roles and put the upset or angry behavior of a peer aside so they can look at the learning points from the skill practice.

The next chapter discusses how to conduct safe and effective demonstrations.

CHAPTER 9

How to Conduct Effective and Safe Demonstrations

Chapter Objectives

- To use five steps for effective demonstrations
- To identify issues associated with high-risk demonstrations and incorporate suggestions for dealing with them
- To learn about demonstration skills
- To learn some tips for successful software demonstrations

Tools

- Demonstration Template
- Skill Practice Discussion Template: ATM Withdrawal
- Skill Practice Discussion Template: Customer Service
- Skill Practice Discussion Template: Software Demonstration

- Skill Practice Discussion Template: Symbolic Demonstration
- Skill Performance Checklist Template
- Skill Performance Rating Scales

Chapter Questions

- What is a demonstration?
- What are four types of demonstrations?
- What can be done to reduce risks when conducting demonstrations?
- How are the five steps of adult learning used to facilitate learning through demonstrations?
- What are some tips for successful software demonstrations?
- What are some characteristics of effective skill practice checklists?

What Is a Demonstration?

You conduct demonstrations to show the learner the correct way to complete a process or a procedure while explaining what the participants hear and see. You supervise participants' return demonstrations as they repeat the same skill and use a skill performance checklist to rate them. Ask questions, give feedback, and make corrections as needed, as well as ask questions to help the learners summarize key points.

For demonstrations to be successful, you must first understand the process or procedure to be demonstrated and be aware of the risk to participants of doing or learning the process or procedure. You must also understand how much practice is required to learn a new skill based on task difficulty, the importance of doing the task in a standardized manner, and the frequency with which the task is done on the job. Be aware of participant sensitivity to feedback. Finally, you must understand how to ask questions that promote reflection and learning.

Several skills are necessary to conduct a successful demonstration and supervise a return demonstration by the learner. Before conducting a demonstration, be sure all of the materials and props are assembled, ready, and working. For example, is the videotape cued up? Has the fire extinguisher been refilled? Begin to set up the demonstration by telling learners the objective and giving an overview of the process or procedure to be demonstrated. Then show how to do the process or procedure while explaining what learners see and hear you doing. Ask and answer clarifying questions and then supervise participant return demonstrations, give feedback, and make corrections. To complete a successful demonstration, supervise practice sessions and evaluate learning through appropriate skill performance tests.

What Are Four Types of Demonstrations?

The first type of demonstration is a *real* demonstration that uses the actual materials to demonstrate a process or procedure. For example, when diabetic patients are taught how to inject themselves, they use a *real* syringe filled with insulin and inject themselves.

Simulated demonstrations imitate reality by substituting different materials for real materials. In the insulin injection example, this would be a symbolic demonstration if water was substituted for insulin and an orange received the injection instead of a person. Airline pilots practice qualifying to fly different types of aircraft by using flight simulators. This type of demonstration is appropriate to reduce the risk of the demonstration to the learner as well as to conserve the cost of materials.

A *symbolic* demonstration uses materials different from what they are, but representing something else. In the sample poker chip demonstration described later in this chapter, blue poker chips symbolize important tasks, while white poker ships symbolize unimportant tasks. Participants are able to use symbols to create a decision-making situation in a contracted, but realistic amount of time to learn a point.

Conduct a *negative* demonstration to produce the opposite of the desired result. A negative demonstration allows learners to understand the consequences of doing a process the wrong way or obtaining an undesirable result. For example, if a clerk is completing an invoice without assessing appropriate shipping charges, the consequence would be a short payment by the customer. The danger in using negative demonstrations is that participants learn the wrong way to do a process or procedure. Only use negative demonstrations when there is an opportunity to immediately correct the negative result and the participants can learn from the mistake.

What Can Be Done to Reduce Risks When Conducting Demonstrations?

High-risk demonstrations need to be trainer-directed to reduce the risk to the participants, the materials, and others. Follow this four-part process to reduce the risk during a demonstration:

1. Do the task and show what to do and tell why the task is done that way.
2. Do the task a second time while the learners describe what you have done and also tell you why the task was done that way.
3. Each learner does the task, but first tells you what he or she is about to do and why it is done that way. After you approve of the description or correct it as needed, each step of the task is done by the learner.
4. The learners summarize task steps or functions and continue with supervised practice.

How Are the Five Steps of Adult Learning Used to Facilitate Learning Through Demonstrations?

As with other training techniques offered in this book, I suggest that you process or debrief learning from a demonstration using the five steps of adult learning.

Tool 9.1 is a template that shows how the five steps apply to demonstrations. Exhibit 9.1 describes a demonstration activity using the five-step model.

Four sample demonstrations follow. The first three are real demonstrations, one for a technical skill (withdraw money from an ATM, Exhibit 9.1), the next is for an interpersonal skill (answer a customer's call, Exhibit 9.2), and the third is for a software demonstration (set up an Item List in QuickBooks, Exhibit 9.3). The fourth sample demonstration is a symbolic demonstration (What's Your Priority? [Exhibit 9.4]). Each demonstration is followed by a discussion template that you can use to debrief it (Tools 9.2, 9.3, 9.4, and 9.5).

Following the demonstration of withdrawing $40, ask the new customer what questions he has about the withdrawal he has just seen. Give him an opportunity to complete demonstrate the skill himself. Use Tool 9.2 to ask questions for Steps 3, 4, and 5 to debrief the demonstration.

Following the demonstration of answering a customer call, ask the learners what questions they have about the call they just heard. Give each CSR an opportunity to answer a call. Ask the other CSRs who listen to a call to complete a Sample Skill Performance Checklist (Exhibit 9.5). Use the questions in Steps 3, 4, and 5 to debrief each call.

Steps 3, 4 and 5 are listed in Tool 9.3 so learners can share and interpret their reactions to the demonstration, identify the concept of what a good call sounds like, and identify how to improve the quality of the customer calls they answer. Duplicate the Skill Practice Discussion Template in Tool 9.3 as a handout for the CSRs.

Steps 3, 4 and 5 are listed in Tool 9.4 so learners can share and interpret their reactions to the software demonstration, learn how to set up an item list, and have their questions answered before the repeat demonstration.

Tool 9.1. Demonstration Template

1. Set up the demonstration telling the why, what, and how.
   - Why are learners completing a demonstration or a return demonstration?
   - What is the benefit to them?
   - What is involved in conducting the demonstration?
   - How will learners complete the demonstration or return demonstration?
2. Conduct the demonstration.
   - Focus on each step of the process.
   - Identify what a typical performance looks like.
   - Identify exceptions and how frequently they are likely to occur.
   - Allow the learner to perform a return demonstration.
   - Give the learner feedback on the return demonstration using a skill performance checklist.
3. Share and interpret reactions to the demonstration by asking questions such as:
   - What was easy or difficult about this demonstration?
   - What helped or hindered your progress?
   - What did you notice when you completed the required steps?
   - Are there consequences for completing a step out of the demonstrated sequence?
   - Was there a turning point in this demonstration when everything came together?
   - What was significant about this demonstration?

Tool 9.1. Demonstration Template, Cont'd

4. Ask learners to identify the concept behind the demonstration by asking questions like:
   - What did you learn from this demonstration?
   - What is the concept that was demonstrated here?
   - What was the main point of this demonstration?
   - What is it better to do?
   - What is appropriate to avoid?
5. Ask learners to apply what they have learned from the demonstration by asking questions like:
   - How will you use what you learned from this demonstration?
   - What do you need to practice some more before doing this process independently?
   - What type of help would you like from your supervisor or co-workers to do this process successfully?

Exhibit 9.1. Sample Demonstration: Technical Skill

Withdraw Money from an ATM

Goal: By the end of this demonstration, the customer will be able to withdraw $40 from an automatic teller machine (ATM).

Group Size: 1

Time Required: 10 minutes

Materials

- ATM
- Bank card

Physical Setting: ATM machine at a bank

Process

Step 1: Set-Up. For this demonstration, let's imagine you are a bank teller who is teaching a teenage boy, who has just opened a checking account, how to withdraw money from an ATM. This skill will be useful when he needs money. Explain you are going to demonstrate the skill by withdrawing money from your checking account and then ask him to complete a return demonstration by withdrawing money from his checking account.

Exhibit 9.1. Sample Demonstration: Technical Skill, Cont'd

Step 2: Demonstrate how to withdraw $40 from an ATM by following these steps:

1. Select an ATM positioned out of direct light so the screen is easy to read. Select an ATM with an audible beep so you know that each step is working.

2. Place the card in the slot according to the diagram so the magnetic strip can be read by the machine.

3. In answer to the prompt, "Do you want a receipt?" enter "yes."

4. Enter the PIN and select the language you want to read for the rest of the transaction.

5. Select the withdraw function key.

6. Enter the dollar amount ($40) for withdrawal and press, "yes" or "enter."

7. At the beep prompt, take the money from the dispensing slot.

8. In answer to the prompt, "Do you want another transaction?" press "no."

9. Take your card and receipt.

Tool 9.2. Skill Practice Discussion Template: ATM Withdrawal

Discussion Questions

Directions: Following the customer ATM withdrawal demonstration, ask the customer these questions:

- Was there anything that made this process easy or difficult for you?
- To what extent were you able to follow the prompts and questions on the screen?
- What could have been done differently that would have helped you get the same result more easily?
- Are there any other functions you would like to see demonstrated?
- Do you feel comfortable using the ATM for most of your transactions?

Exhibit 9.2. Sample Real Demonstration: Interpersonal Skill

Answer a Customer's Call

Goals: By the end of this demonstration the customer service representative (CSR) will be able to:

- Use telephone and computer software to answer a customer's call
- Identify the purpose of the customer's call
- Listen to the customer's request
- Answer a customer's questions
- Explain service options
- Agree on next steps
- Follow up to implement the preferred option

Group Size: 2 to 3 CSRs

Time Required: 30 to 60 minutes

Materials

- Telephone and headset
- Computer and customer data base software

Physical Setting: CSR cubicle with additional chairs and headsets for up to three CSRs

Process

Step 1: Set-Up. Tell the learners you will teach them the skills to solve customers' problems. You will take real customer calls to demonstrate how to answer a customer call. Answering calls is a core skill for their jobs and one that is important to your business.

Following your demonstration, each CSR will take turns answering customer calls. Each call will be evaluated using a skill performance checklist and discussed with you and the CSR's peers.

Exhibit 9.2. Sample Real Demonstration: Interpersonal Skill Cont'd

Step 2: Answer the call.[1] Follow these steps to answer a customer's call:

1. Greet the customer appropriately, giving your name and title.
2. Ask open questions appropriately to get complete information.
3. Ask closed questions appropriately to control the conversation.
4. Give correct information regarding troubleshooting.
5. Make appropriate acknowledging statements to the customer's complaint.
6. Do not promise undeliverable service.
7. Be courteous and polite.
8. Handle customer's negative reactions appropriately.
9. Use appropriate closing comments.
10. Complete the call within required time limit.

[1]A task analysis of this skill is provided in Chapter 7 of *Assessing Training Needs,* by Jean Barbazette, the first book in *The Skilled Trainer Series.*

Tool 9.3. Skill Practice Discussion Template: Customer Service

Discussion Questions

Directions: Following the call demonstration, write the answers to these questions:

- What did you do that helped the process?
- What did you do that hindered the process?
- To what extent were you able to follow the form and questions you are to ask the customer?
- What could have been done differently that would have helped you get better results?
- What are some general concepts about customer service that you learned from this activity? For example, "It is better to __________________ than to __________________."
- How can you use this process to be a more effective CSR?
- How can you apply what you learned from this experience to your job?

Exhibit 9.3. Sample Software Demonstration

Set Up an Item List Using QuickBooks[2]

Background Information: When business owners first use QuickBooks to manage the financial aspects of their businesses, they must first set up an "Item List" of products and services their businesses provide.
Objective: Learning How to Set Up the Item List

Set-Up

- Tell the learner the objective.
- Say, "The second master file list we'll examine is the Item List."
- Say, "This list is very important because it lets you track what you buy, hold in inventory, and sell to your customers. Items are the products and services you sell. Items also include anything that might appear as a 'line item' on invoices and sales receipts, such as discounts and sales taxes."
- Say, "Let's see how we can do this. Together we'll demonstrate the process; then I'll ask you to do one on your own company."

Activity

- Demonstrate how to add an item to the Item List. Ask participants "how to" questions wherever possible.
- At each screen, allow a moment for participants to become familiar with the layout and content of the screen.
- Sample interactive demonstration:
  - Ask: "How do you think we can get to the Item List?"

    You can get to the Item List using the Customer Navigator.

[2]This demonstration was written by The Training Clinic for Intuit and is used with their permission.

Exhibit 9.3. Sample Software Demonstration, Cont'd

- Say: "Take a moment to see how the screen is laid out: Name of the item, description, what type it is, which account it belongs to, etc."
- Say: "Now, if we want to add to the Item List, what do you think the first step is?"

  Select "Item"
- Ask: "From the Item menu, what do we want to do?"

  Select "New"
- Ask: "From the New Item window, what do we want to do?"

  Choose "Type" from the pull-down menu

  Enter name

  Enter description

  Enter the rate you are charging for the item or service

  Enter tax code

  Choose the correct income account from the Chart of Accounts from the pull-down menu
- Ask: "Anything else we need to do? What's left to do?"

  Select "OK" to record the item

Steps 3, 4, and 5 are listed in Tool 9.4 so that learners can share and interpret their reactions to the software demonstration, identify the concept of how to set up an Item List, and ask questions before the repeat demonstration.

What Are Some Tips for Successful Software Demonstrations?

Software demonstrations seem to be a bit different from other types of demonstrations. Use these suggested ideas to conduct software demonstrations.[3]

Best Practices for Software Demonstrations

- Practice, practice, practice. Create a demo script and test it.
- Be careful to avoid varying from the script (to answer a question), unless you are very familiar with that part of the software.
- Tell learners what you are going to show them. Show them. Tell them what you have shown them.
- Make sure everyone can see the projected image clearly. Pay attention to the room lighting and the size of screen where the image is shown.
- Don't go too fast. It is easy to lose your audience if they cannot follow where you are going.

Managing Fast and Slow Learners During Hands-On Practice

- During the first hands-on exercise, you will be able to identify the fast and slow or struggling learners.
- Include optional hands-on exercises designed to keep the fast learners busy.
- If you have too many slow learners to handle and give them individual attention, ask a fast learner to help a slow learner.
- If working in pairs, separate two slow learners. A very slow and very fast learner could also be a frustrating match.

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[3]Thanks to Training Clinic Instructor Ellen Brennan for compiling these ideas.

Tool 9.4. Skill Practice Discussion Template: Software Demonstration

Discussion Questions

Directions: Following the "Set Up an Item List" demonstration, discuss the answers to these questions.

- What made this easy or difficult to set up the item list?
- How will you remember where to start?
- What is essential to make this an accurate transaction? (*Answer:* Make sure each item is tied to an income versus an expense account.)
- What is important to remember when adding an item? (*Answer:* Address all of the fields on the New Item screen. If you choose to leave one blank, do so knowingly.)
- What questions do you have before you practice setting up your own item list?

Support for the Trainer

- Co-train. If at all possible, use two trainers to deliver the class. There are lots of opportunities to support each other.
- Environment support. Is there someone available to handle hardware/software/network problems during the class?
- Software technical support. Is there someone the co-trainer can send messages to during the class to help solve problems?
- Post-class support. Each class could end with a long list of unanswered questions. Generally the trainers do not have the time or resources to provide solutions. Where do learners go to find out the answer to the questions? Consider an electronic support system or help line.

What to Do When You Do Not Know the Answer to a Question

- Setting expectations. Make it clear that because the software is so new, you may not have all the answers to their questions.
- Paraphrase, to be clear you understand the question and to buy time in case you might have a partial answer.
- Give a "gut feel" answer if you can, and agree to verify the answer at a later time.
- Put questions on a "parking lot" or ask for a volunteer to keep a list of questions.
- Research the issue, or have someone else research it and get back to the class.
- Before your next class, try to find the answers to those questions that are most likely to be raised again.

Exhibit 9.4. Sample Symbolic Demonstration

What's Your Priority[4]

Goals: Any of these purposes can be the objectives for this activity:

- To learn the usefulness of time efficiency (use correct techniques) versus time effectiveness (select correct priorities)
- To identify elements of teamwork that help or hinder task accomplishment
- To identify how to respond appropriately to incomplete instructions or directions. Supervisors do not always give complete instructions or directions. It is up to the employees to ask questions to get the job done according to the unspoken expectation.

Group Size: Ten or groups of ten

Time Required: Forty-five minutes to one hour

Materials

- 30 poker chips for each group of ten people (10 of blue, 10 of red, 10 of white)
- Glass, cup, or container for each set of chips
- Stopwatch
- Easel paper and markers
- Copy of discussion questions for each person

Physical Setting: Most classroom settings with tables and chairs can be used. Some groups may choose to stand up for the activity. Clearing tables for a free workspace is helpful.

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[4]By Jean Barbazette and reprinted with permission from *The 2005 Pfeiffer Annual: Training,* pp. 35–40.

Exhibit 9.4. Sample Symbolic Demonstration, Cont'd

Process

Step 1: Set-Up

1. Tell learners they are going to learn something about their group-problem-solving skills through a demonstration that uses poker chips. Divide the class into teams of an equal number with no fewer than five people. Use observers for larger groups.
2. Give each team an equal number of blue, red, and white poker chips in a cup. Ten chips of each color is best. If your purpose for this activity is working on priorities, providing another ten of the white chips to each group's supply can help to make the point of prioritizing tasks.
3. Explain the rules:
   - The group must pass each chip through all hands and then deposit it into a cup within thirty seconds.
   - The starter must *pick up* each chip with one hand, move it to his or her other hand, then pass to the next person in the group.
   - No sliding the chip on the table.
   - Only one chip in a hand at a time.
   - No more chips in cup when time is called.
4. Allow groups to practice, strategize, and move chairs, clear tables, etc. You should be *unavailable* to participants during their practice time. Talk to the observers in the hallway outside of the room and ask them to observe their groups' techniques (what helps the process, what hinders the process, examples of teamwork, etc.). Give the observers copies of the written discussion questions.

Exhibit 9.4. Sample Symbolic Demonstration, Cont'd

Step 2: Conduct the Activity

1. Conduct the first thirty-second drill and have each group count the number of chips that completed the circuit of ten people and ended up in the cup. Also, have the groups select a name for themselves. Record names and scores on an easel.
2. Reveal point values of the poker chips: 10 = blue, 5 = red, 1 = white
3. Many in the group will say, "No fair, you didn't tell us that!" That's one of the learning points of this demonstration. If someone asks before this point if the chips have value, avoid answering the question.
4. Record point values on an easel next to the chip count for each group from the first round.
5. At this point, most groups want another opportunity to improve their point scores. Conduct the drill a second time and tell them that the objective is to improve their *point* score. Groups may want a few moments to strategize in light of new information about point values. Ask the group whether they have questions and answer them. The same point values apply to round 2.
6. Conduct another thirty-second round. Record new scores for points and chip count.

Step 3: Share and Interpret Reactions

Duplicate Tool 9.5, the Skill Practice Discussion Template, as a handout for the group members to record their answers as part of this discussion. Consider changing the questions depending on the type of demonstration. Participants sometimes need time to gather their own thoughts before discussing their reactions with others. Allow individual time to write answers before discussing the questions. In large groups, ask the observers to facilitate a small-group discussion of these questions:

Exhibit 9.4. Sample Symbolic Demonstration, Cont'd

- What do the numbers say about the results of your efforts?
- What helped or hindered the process (include feedback from observers). For groups with a teamwork purpose, it may be helpful for each team member to rate on a scale of 1 to 5 the helpfulness of each group member.
- Discuss priorities, roles different group members played, changing the rules, not knowing all the rules, etc.

Step 4: Identify the Concepts

To help participants learn from this demonstration, ask small groups to come up with some generalizations about what they learned from this activity. What generalizations can be made about group productivity and teamwork from the process? Have groups write "It is better to . . . than to. . . " (for example, It is better to slow down and increase productivity by doing blue chip items.)

If the concept you want the participants to discover is about teamwork, time management, or listening to directions, ask alternative questions that will help participants find the concept.

Step 5: Apply to Your Team

Finally, ask participants, "How can you apply this experience to your team, your job?" Ask learners to write down answers individually, discuss their answers in small groups, and then discuss common themes in large group.

Tool 9.5. Skill Practice Discussion Template: Symbolic Demonstration

Discussion Questions

Directions: Following the demonstration, write the answers to these questions:

- What did you do that helped the process?
- What did you do that hindered the process?
- What did other team members do that helped?
- What did other team members do that hindered?
- What could have been done differently that would have helped your group get better results?
- What are some general concepts about teams, time management, or listening to directions that you learned from this activity? For example, "It is better to _________________ than to _________________."
- What can you do to be a more effective team member?
- How can you apply what you learned from this experience to your team? To your job?

What Are Some Characteristics of Effective Skill Practice Checklists?

A skill performance checklist assumes knowledge and asks the learner to "do" the task that has been demonstrated. A sample skill performance checklist appears in Exhibit 9.5 to measure the success of a return demonstration by the learner. Tool 9.6 is a template for the checklist. Below are some suggested steps you can use to write skill performance checklists of your own.

1. Identify the *activity* that the learner will perform in the return demonstration. For example, the learner who is studying to be a customer service representative will be able to:
   - Verbally answer a question (what form the customer is to complete)
   - Complete an inquiry form (internal activity report)
   - Write a report (summary of activity completed)
   - Do a computation (how to compute an invoice amount)
2. Make a *checklist of the steps* for you to rate the learners' skill. If the skill demonstrated is a "process" and the sequence is critical, note that the steps must be performed in a specific order. If the skill demonstrated is to produce a "product," note the criteria for a complete product.
3. Select a *rating system* for you to measure the skill performance. Decide whether the rating system will measure:
   - Quality (how well/correctly the skill is performed)
   - Quantity (how often the skill is performed)
   - Speed (how quickly the skill is performed)
   - Sequence (the steps of the skill performed in the correct order)

   More than one rating system/category may be used. The "condition" in the learning objective often describes whether the skill is performed to a standard of quality, quantity, speed, or sequence.

Exhibit 9.5. Sample Skill Performance Checklist

Learning Objective

By the end of this lesson, the learner will be able to, given a real customer's call, correctly answer all questions and complete all required steps in answering the call.

Return Demonstration

You are a customer service representative (CSR) at an appliance repair and service center. Your primary job is to answer questions about the types of appliances your organization repairs, the cost of a service call, and when service might be available, and to troubleshoot repairs in progress. You will most likely talk to an owner of a laundromat who is a "good" and recurring customer. Your task is to identify the repair need that the owner is calling about and offer an appropriate repair option that satisfies the customer.

Skill Performance Checklist

Directions: As you observe a customer call, complete this form. Following the call, you will give the CSR feedback on his or her performance. Rate each step or task in the return demonstration using the scale below.

1 = did not complete this step
2 = partially did the step, not to standard
3 = did the step, completed the standard
4 = did the step, exceeded the standard

_____ 1. Greeted the customer appropriately, giving name and title.

_____ 2. Asked open questions appropriately to get complete information.

_____ 3. Asked closed questions appropriately to control the conversation.

_____ 4. Gave correct information regarding troubleshooting.

Exhibit 9.5. Sample Skill Performance Checklist, Cont'd

_____ 5. Made appropriate acknowledging statements to the customer's complaint.

_____ 6. Did not promise undeliverable service.

_____ 7. Was courteous and polite.

_____ 8. Handled customer's negative reactions appropriately.

_____ 9. Used appropriate closing comments.

_____ 10. Completed the call within required time limit.

List any additional comments to improve the performance of this CSR when dealing with this type of call.

Skill Performance Rating Systems

Tool 9.7 presents some different scales to measure performance in a return demonstration. Depending on the specific skill being rated, these scales can be modified appropriately. In all of these rating scales, the higher numeric rating is considered a better score.

The next chapter focuses on how to conduct, administer, and facilitate tests.

Tool 9.6. Skill Performance Checklist Template

This template is a model "Skill Performance Checklist" based on the three steps listed above.

Learning Objective: (Record the learning objective that this skill performance checklist will achieve in a return demonstration.)

Identify the Level of Learning to Measure Skill Performance.[1] (Which one or more levels will be measured?)

- Application
- Analysis
- Synthesis
- Evaluation

Identify the Activity to Measure Skill Performance (Which activity matches the skill in the return demonstration?)

- Answer a question
- Complete a form
- Write a report
- Do a computation
- Conduct an interview
- Complete a phone call
- Other

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[1]These four levels are titles from *Bloom's Taxonomy: A Forty-Year Retrospective*, edited by L.W. Anderson and L.A. Sosniak. National Society for the Study of Education, 93rd Yearbook, Part II, 1994.

Tool 9.6. Skill Performance Checklist Template, Cont'd

Write a Checklist of Steps to Measure Skill Performance (List the steps that achieve the learning objective and match job performance in the return demonstration. See the samples in this chapter for checklists of steps.)

Choose a Rating System to Measure the Skill Performance (Which type of rating system matches the condition of the learning objective? See the sample rating systems in Tool 9.7 that follows.)

- Quality
- Quantity
- Speed
- Sequence

Tool 9.7. Skill Performance Rating Scales

Quality

A quality rating scale assumes there is an acceptable standard of the performance being demonstrated. Consider these types of rating scales to measure *how well* or *how correctly* a skill is performed.

How *Well* a Skill Is Performed

1 = Fails to meet standard

2 = Completes few steps correctly

3 = Meets most requirements

4 = All steps done correctly

5 = Exceeds standard

How *Correctly* a Skill Is Performed

1 = Did not use appropriate people, tools, materials

2 = Skill partially completed

3 = Skill completed correctly

4 = Skill completed correctly under prescribed conditions

5 = Skill completed correctly under prescribed conditions and meets all standards

Quantity

A quantity rating scale assumes there is a minimum standard of the performance being demonstrated. Use this type of rating scale to measure how often the step is done.

1 = Step is not performed

2 = Step is done once

Tool 9.7. Skill Performance Rating Scales, Cont'd

3 = Step is done required number of times

4 = Step is done more often than required by the standard

Speed

A speed rating scale assumes there is a minimum or maximum standard of the performance being demonstrated. Use this type of rating scale to measure how rapidly the step is done.

1 = Step is done too slowly or too quickly

2 = Step is done to standard

3 = Step positively exceeds standard

Sequence

A sequence rating scale assumes there is a standard order of steps for the process. Use this type of rating scale to measure whether the prescribed order of steps is followed.

1 = Prescribed sequence of steps was not followed

2 = Several steps performed out of sequence

3 = One step performed out of sequence

4 = All steps performed in the prescribed sequence

CHAPTER 10

Conduct, Administer, and Facilitate Tests

Chapter Objectives

- To learn how to select appropriate knowledge and skill performance tests
- To learn to administer tests fairly and keep the testing process honest
- To learn to provide corrected tests and feedback in a timely manner

Tools

- Checklist for Test Administration

Chapter Questions

- How are tests selected appropriately?
- How are tests administered fairly?
- How can tests be used as a developmental experience for learners?

How Are Tests Selected Appropriately?

You will need to limit test content to material already taught in the course by distributing written test materials efficiently and at the right time. How to write tests is discussed in another book of *The Skilled Trainer Series.* To conduct, administer, and facilitate tests, you must give the learners clear directions, monitor their progress, and answer questions without providing unwarranted assistance. You then collect and correct the tests and provide feedback to the learners in a timely manner.

Be sure that the test participants take is related to meeting the learning objectives for a course. Content outside the learning objectives is not appropriate. If a standard test has been created for a specific course, review the test questions to be sure all the material on the test was covered during the training program. If necessary, eliminate questions about material not covered or rewrite questions to more specifically test for information covered during the training.

How Are Tests Administered Fairly?

Tests are fairly administered when participants are physically placed in a space where they will not receive assistance. Test directions must be clear. For example, tell participants how the test will be graded, whether guessing at answers will be penalized, or whether it is better to leave an answer blank if one is not sure of the answer. Provide needed supplies such as paper, pencils, pens, blank answer sheets, and so forth. Tell participants how much time they have to take the test and give a warning when a few minutes remain before the end of the test. Tell participants whether or not they may leave the test room for any reason during the test.

Finally, be alert to the probability that some participants may use resources beyond their knowledge and skills to help them answer the test. Some participants may attempt to cheat. It is more likely that cheating will occur during the last 25 percent of the time allowed to take a test. It is best to monitor participants who are taking the test from the back of the room. Irregular or strange behavior is more easily noticed from this vantage point. Look for participants who are looking around the room or going through purses, back packs, or other bags they may have brought with them. Be alert to participants who might have written answers on their arms, sleeves, or on hidden pieces of paper.

How Can Tests Be Used as a Developmental Experience for Learners?

Taking a test can be a developmental experience for a learner if the testing process is fair, if the learner knows the criteria for evaluating test questions, and if criteria for passing the test are known prior to taking it.

One hopes the participants will learn something from taking a test. They might learn that they have the knowledge and skill required to do a particular job. They might learn that they can apply knowledge and skills to specific situations, thus demonstrating a certain level of proficiency.

Tests can be a developmental experience when the learners know prior to the test what knowledge and skills will be tested. It is helpful if they know the format for the test. For example, will the test be made up of multiple-choice and true/false questions along with a series of essay questions? Participants need to know what the standard for passing the test will be. Is there an absolute score, or will the test be graded "on the curve"? Is 75 percent a passing grade? Is scoring in the top 20 percent of those taking the test enough to pass the test? Will test scores be reported as pass/fail, or will a numeric or letter grade be given? Test norms and metrics should be established prior to giving a test. How many opportunities does the participant have to take the test in order to pass? Is there a testing fee? If so, does the fee apply each time the test is taken, regardless of the score?

A test can only be a developmental experience when the test is corrected in a timely manner and the results are provided to the learner. This is especially critical when the learner does not pass the test. Tell the learner where he/she has failed to answer a question and what type of answer was expected. Give learners clear feedback when they have answered a question adequately and when they have fallen short.

The test administration checklist in Tool 10.1 might be helpful to trainers who monitor or administer tests.

The next chapter discusses appropriate audiovisual support for training.

Tool 10.1. Checklist for Test Administration

Directions: Use this checklist to be sure a test is fairly and appropriately administered.

Prior to the Test

____ Review test questions to be sure all questions pertain to the learning objectives.
____ Review test questions to identify questions that have not been covered by course content.
____ Write new questions for content not covered by the test.
____ Establish passing criteria and metrics for essay test questions.
____ Announce the time and location for the test to the participants.
____ Set up the test room to allow enough space between participants and to allow for ease in monitoring participants.

During the Test

____ Seat participants and explain ground rules for taking the test.
____ Identify job aids that are allowed to assist participants in taking the test.
____ Announce test directions and answer any questions.
____ Distribute test materials.
____ Announce the amount of time allowed to take the test.
____ Monitor participants during the test.

Following the Test

____ Correct the test as soon as practical or arrange for machine scoring of commercial tests.
____ Apply metrics equitably to all tests.
____ For new tests, complete an item analysis to determine whether all test questions are valid.
____ Identify participants who pass and report those scores to the participants.
____ Identify participants who fail the test and how they can improve their scores the next time the test is taken.
____ Record test results in the participants' transcripts.

CHAPTER 11

Audiovisual Support

Chapter Objectives

- To identify the advantages and disadvantages of different types of media
- To identify the best types of audiovisual support for various kinds of training
- To learn to use visual images that support the learning objective
- To select a variety of media to enhance different learning styles
- To learn to use color appropriately

Tool

- Checklist for Selecting Audiovisual Materials

Chapter Questions

- What are appropriate ways to support training through audiovisuals?
- What are the advantages and disadvantages of different types of audiovisuals?
- What are some suggestions for using visual images well?
- What are appropriate colors for visuals to support training objectives?

What Are Appropriate Ways to Support Training Through Audiovisuals?

Visuals show appropriate and accurate images and copy. Visuals support the content, rather than replace it. Selecting appropriate support means starting with the learning objectives and deciding whether or not the content you are teaching would be enhanced with a visual image or through the use of sound. You might choose a drawing, image, cartoon, or video clip that makes a point and meets the learning objective. Select and use audiovisual support that respects the copyright of others' materials.

Effective visual support means selecting the right type of image that supports the objective, for example: Use a bar chart when comparing magnitude. Use a line graph to show a trend. Use a pie chart to show data that is relative to a whole. Symbols are good to use when showing complex ideas. Use a schematic to demonstrate process flow. Drawings are a good way to illustrate functionality. When showing a list of topics, key ideas, or references, use a table or bullet points. Finally, pictures or cartoons are helpful when demonstrating the context, situation, or specific idea.

What Are the Advantages and Disadvantages of Using Different Types of Audiovisuals?

Different media and different types of equipment have their advantages and disadvantages. Exhibit 11.1 lists considerations when selecting the appropriate type medium and equipment.

When selecting audiovisual support for use, always preview commercial materials prior to use and/or purchase. See Tool 11.1 for suggested ways to evaluate commercial materials.

Exhibit 11.1. Advantages and Disadvantages of Various Media

Medium or Equipment	Advantages	Disadvantages
Projected computer slides shown through LCD projectors	Reproduces motion through animation, able to use audio. Gives a consistent and professional look to visuals. Allows for inclusion of digital photographic images. Newer projectors are lightweight and portable.	Overuse of slides (writing everything that is said). Too many words on slide are difficult to read. Equipment is expensive and prone to theft if left unattended.
Overhead transparencies and overhead projectors	Freedom to revise sequence, inexpensive, easy to produce, and can be used instead of a chalkboard. Allow trainer to maintain eye contact with participants.	Less compact than electronic slides and not transferable to other media. Hand lettered visuals look unprofessional. Manual operation does not allow for remote control. The screen needs to be adjusted to avoid keystoning.
35 mm slides and projectors	Slides can be changed easily and economically. Give the ability to show realistic images and allow for addition of sound tracks. Readily available, portable, can be used with front and rear screen projection. Remote or manual control options are available, along with the ability to adjust image size to fit a screen.	Special equipment is required for production, time is needed for film processing. Room lights must be dimmed, and not all equipment is compatible with different types of slide trays.
Whiteboard or chalkboard or flip charts	Easily used, inexpensive, good for small groups and facilitated discussions.	Requires spelling and printing skills by the trainer. Messy handwriting is difficult to read. Difficult to show images to large groups. Some boards require special types of pens. Some boards are difficult to clean completely.

Exhibit 11.1. Advantages and Disadvantages of Various Media, Cont'd

Medium or Equipment	Advantages	Disadvantages
Videotapes, CDs, or DVDs	Excellent medium to show motion and sound and can be instantly replayed. Licensing commercial products is easy.	Production costs are high, although they are coming down. Some commercial products are expensive to license.
VCR, CD, or DVD players	Equipment is becoming less expensive, and the medium is becoming more standardized than the initial VCR formats were (VHS versus Beta). Tapes and disks can be erased and reused.	Room lighting needs to be dimmed for images to be seen. Older players are less portable. Newer compact players or laptops that project this medium are subject to theft if left unattended. Technology is changing rapidly, which makes older technology obsolete.
Easel pads or flip charts	Allows for diverse use to support small groups, facilitation, and brainstorming activities. Paper and stands can be placed anywhere in the training room. Stands and paper are relatively inexpensive. Adhesive charts or plastic sheets that cling to smooth surfaces can be posted in the room without damaging walls. Paper is fairly inexpensive. Charts can be prepared ahead of time and posted in the training room. Charts are reusable.	Messy handwriting is difficult to read. Difficult to show images to large groups. Some methods of fastening charts to classroom walls can damage wall surfaces. Learners can feel manipulated if the scribe changes the learner's words when writing them on the chart. Older and less expensive stands are rigid, difficult to transport, and fall apart easily.

Tool 11.1. Checklist for Selecting Audiovisual Materials

Title: ______________________ Running Time: ______________________*

Producer: _________________ Color __________ Black/White __________

Check the Appropriate Column	**Good**	**Poor**
Clearly stated objective	_____	_____
Objective matches program objective	_____	_____
Material fits our industry		
only for our industry	_____	_____
general enough to include our industry	_____	_____
Content		
comprehensive and inclusive	_____	_____
too much covered/too little	_____	_____
knowledge and concepts are clear	_____	_____
examples specific and concrete	_____	_____
examples realistic and believable	_____	_____
pictures or examples, not people talking	_____	_____
Technical quality of film, sound, artwork	_____	_____
Opportunity for follow-up presented	_____	_____
Program and discussion guides included	_____	_____

Suggested Uses

____

General Comments

____

Overall rating _____ _____

Recommend: buy rent reject

Cost: (buy) (rent) (preview)

Format: 16 mm film VHS Video CD DVD

Reviewer's Name: ______________________ Date: ____________

*Match to Methods Variety Scale (Tool 1.5 in Chapter 1) and identify how to facilitate the video effectively if running time is more than fifteen minutes.

What Are Some Suggestions for Using Visual Images Well?

When showing visual images on a screen from a computer or any type of projector, be aware that the learners' eyes follow motion and light. When you want the learners' attention focused on you, turn off the projected image. When using PowerPoint, press the "B" key to make the screen go to black or "W" to make the screen go to white. Press the same letter or the space bar to restore the slide. For a list of other functions you can use, press the F1 key when PowerPoint is in the "slide show" mode.

Face the learners, not the screen, when making or emphasizing learning points. If possible, have the computer screen facing you so you don't have to turn around and check what is on it. If you can see the computer screen, stand to the left of the projected image on the room screen, which makes it easier to look from the learner to the screen and then reference information on the screen.

Create images on the screen that support the handout materials. Handout materials and visuals have different purposes. Provide enough information in a handout that you can avoid having participants write down what is shown on the visuals.

Consider preparing "hidden slides" to answer potential participant questions. Hidden slides can also be used as enrichment activities. Prepare slides that reinforce directions to learning activities. Prepare slides with questions to process or debrief learning activities and promote interaction. Landscape-oriented slides are easier for learners to see than portrait-oriented slides. Limit the number of lines to six and make the font size no smaller than 32 points for effective use with most sizes of audiences. Choose one type of slide transition during a workshop. While using several types of transitions between slides can add variety, it is often distracting to the learning objective. Use limited types of animation when showing lists of words. The focus of the visual ought to be on the message and not on distracting learners through excessive motion. Remember, the participants' eyes follow motion and light. Keep the focus on the message.

What Are Appropriate Colors for Visuals to Support Training Objectives?

Most people associate feelings and concepts with specific colors. The suggested associations are for American culture. Other cultures have different meanings for colors. Consider the feeling or concept being projected through visuals when selecting specific colors as backgrounds or for letters and images.

- *Green:* analytical, precise, brings out opinions, resistance to change
- *Blue:* calm, traditional, reduces blood pressure, easiest to read
- *Red:* power, impact, impulse, intensity
- *Yellow:* bright, cheerful, hope, restless
- *Purple:* mystical, magic, irresistible, delight, light-hearted
- *Brown:* passive, foundation, desire for home, solid roots

The next chapter ties audiovisuals and facilitation skills together and discusses online facilitation.

CHAPTER 12

Online Facilitation

Chapter Objectives

- To use the technology and gain appropriate support for online learning
- To compensate for lack of a face-to-face setting
- To facilitate a threaded discussion
- To promote interaction using the technology of online learning while avoiding pitfalls
- To decide whether to stay with a prepared script or to change course

Tools

- Orient the Learner to the Technology Checklist
- When to Depart from the Prepared Script
- Options for Straying from a Prepared Script

Chapter Questions

- How is facilitation in a virtual classroom different from facilitation in a physical classroom?
- What skills are needed to facilitate online learning?
- How does an online facilitator orient the learners to the technology?
- How can a facilitator compensate for lack of face-to-face contact?
- What are some ways to facilitate a threaded discussion?
- What are some tools to promote interaction during online learning?
- What type of support does an online facilitator need for success?
- What are some pitfalls in online learning, and how are they overcome?
- What factors help a facilitator decide whether to stay the course with a prepared script or lesson plan or to take a training program in a different direction?

How Is Facilitation in a Virtual Classroom Different from Facilitation in a Physical Classroom?

The major differences between the virtual and physical classrooms include dealing with the technology in the virtual classroom and compensating for the lack of face-to-face communication. This chapter will address how to use the technology and give some facilitation techniques that can be used successfully in the virtual classroom.

What Skills Are Needed to Facilitate Online Learning?

This chapter is not a discussion about different learning management systems (LMS). Many of the differences between the virtual and physical classroom have to do with the systems and equipment used by an organization and are beyond the scope of this book.

Rather, here we discuss basic and advanced skills needed to facilitate online learning, regardless of the specific LMS a trainer uses. You must be aware of research that supports the use of technology as an effective learning tool and understand the capabilities of different types of technology. That knowledge will allow you to smoothly operate the specific software and hardware that are a part of the course. As an online facilitator, you must place learners at ease when introducing new technology through a variety of learning activities. You must provide written and verbal directions for others to operate technical tools, interact appropriately with technical support personnel, and complete system and sound checks prior to conducting an online course.

How Does an Online Facilitator Orient the Learners to the Technology?

First-time learners appreciate an orientation to online learning and the virtual classroom. Some suggestions are given in Tool 12.1.

Tool 12.1. Orient the Learner to the Technology Checklist

In a Confirmation Letter

- Tell how to do a system check the day before class.
- Connect to synchronous events fifteen to thirty minutes before the start of the session.
- Be sure to provide the user sign-in and password for the event. Provide a method to remind those who forget or misplace sign-in information.

When Participants Enter the Virtual Classroom

- Have the administrator introduce himself or herself and tell the role of the administrator, who will monitor chat, troubleshoot technical problems, etc.
- Do a sound check and tell participants how to adjust sound volume from their desktops.

During the Course

- Give a virtual tour of the tools by demonstrating each tool through an activity.
- Ask participants to answer a poll.
- Ask several easy to answer questions to get the group to interact and use the tools.

Off-Air Assignments

- Provide written directions for posting, chat, and asking questions in email.
- Give time frames and deadlines for assignments.
- Provide guidelines for when to use *chat* (something of interest to all or typical questions) and when to send *email* to the instructor (private concerns).

How Can a Facilitator Compensate for Lack of Face-to-Face Contact?

Use these techniques to compensate for lack of face-to-face contact:

- Ask participants to post an electronic picture with an introduction.
- Rehearse synchronous events and obtain feedback from a pilot group.
- Give extra preparation time when writing questions to gain interaction. Be sure the questions are asked appropriately to get the type of answers you want.
- Use participants' names when asking questions, giving feedback, or responding to posts and assignments.
- Place pins or flags on a map to show where participants live.
- Ask participants for local news.
- Use descriptive words to paint a picture.
- Find a book/article on visualization and learn more about how to create mental images.

What Are Some Ways to Facilitate a Threaded Discussion?

A threaded discussion begins with a clear assignment to the participants. Pose a question and give an example of the type of answer you are expecting. As participants post their answers for everyone to read, it may be necessary to ask additional questions if an answer that is posted is incomplete or not very thoughtful.

Your job is to be sure that everyone has an opportunity to enter into the discussion. If the thread gets off track, refocus the discussion with a direct statement or ask a question that returns the discussion to the original objective. If necessary, establish a new thread. Types of assignments that can be part of a threaded discussion include responding to a reading assignment, completing a form or idea for others to review, finding a work sample that illustrates a point, or describing an application.

What Are Some Tools to Promote Interaction During Online Learning?

Tools to promote interaction depend on whether you are facilitating a synchronous (all learners and the trainer are online at the same time) or asynchronous (learners are separated by both time and space) learning event.

For *synchronous* events, use polling and testing features. Ask learners a variety of planned and spontaneous questions. Tell learners whether you want them to answer your question using the auditory tool (raise your hand to share the microphone) or the public chat feature. Newer online learners may prefer writing an answer using the public chat feature. Make use of whiteboards for brainstorming lists and creating drawings.

Use the subgrouping feature to divide larger groups and give each group a specific assignment. Use application sharing to have learners insert data into a group spread sheet. Use virtual tours and streaming media to provide a variety of visual images beyond slides. At the end of the workshop, have participants complete an online participant evaluation form.

For *asynchronous* learning events, consider making off-air assignments that require research, reading, and posting. Make assignments for participants to answer discussion questions in a threaded discussion or via email. Make polling questions part of a class assignment. Have participants respond to a poll and justify a choice or answer. Conduct online tests and have learners complete a participant evaluation form online at the end of a workshop.

What Type of Support Does an Online Facilitator Need for Success?

A facilitator will need three types of support to be successful: administrative support, technical support, and a co-facilitator. Use administrative support to enroll and confirm online workshop registrations. Also use administrative support to distribute course materials. Use technical support to assist participants who don't remember their passwords and/or user names, to assist with audio problems, and to adjust the size of the PC screen so shared applications fit the screen and learners can avoid scrolling. It is important to use a headset microphone to avoid echoes and feedback. Use a co-facilitator to keep track of synchronous chat questions and provide technical and administrative support or direct participants to appropriate support.

For any type of online facilitation, consider how support will be delivered to the learners. Typical types of support include online help, email, and telephone help.

What Are Some Pitfalls in Online Learning, and How Are They Overcome?

Here are five types of pitfalls. After a definition and explanation of each type, suggestions are given for avoiding each of them.

1. *Being the expert all the time.* Allow others to share their expertise. Seek resources among written and internal experts. Make their work part of the program. Give attribution whenever possible. Ask participants for their experiences.
2. *Controlling the airtime.* Plan for participants to contribute to the discussion through polls, discussion questions, subgrouping, and other activities.
3. *Management issues.* Keep the focus of your training session on acquiring knowledge or skills. If policy issues arise, explain that you are the messenger and not the originator of the policy. If issues arise during the training, offer to bring those issues to management's attention following the training.
4. *Technical support.* No e-facilitator can possibly present an online session without technical support. The most frequent problem for participants is forgetting how to sign in or to get the appropriate password to join the class. Check audio and system capabilities prior to the session. Ask participants to join the class at least fifteen minutes prior to the start of the program. Have a co-facilitator watch for questions in the chat feature or answer technical questions.
5. *Lasting impressions.* You only have one opportunity to make a lasting impression. Typically it is made during the first five minutes. Carefully select visual images that the participants see when they join the session. Have music playing so they know their audio is working. Select professional-looking visuals to illustrate your training session. Obtain suggestions from peers who attend a pilot session of your workshop. Work toward continuous improvement. Ask participants for feedback about how to improve your session.

What Factors Help a Facilitator Decide Whether to Stay the Course with a Prepared Script or Lesson Plan or to Take a Training Program in a Different Direction?

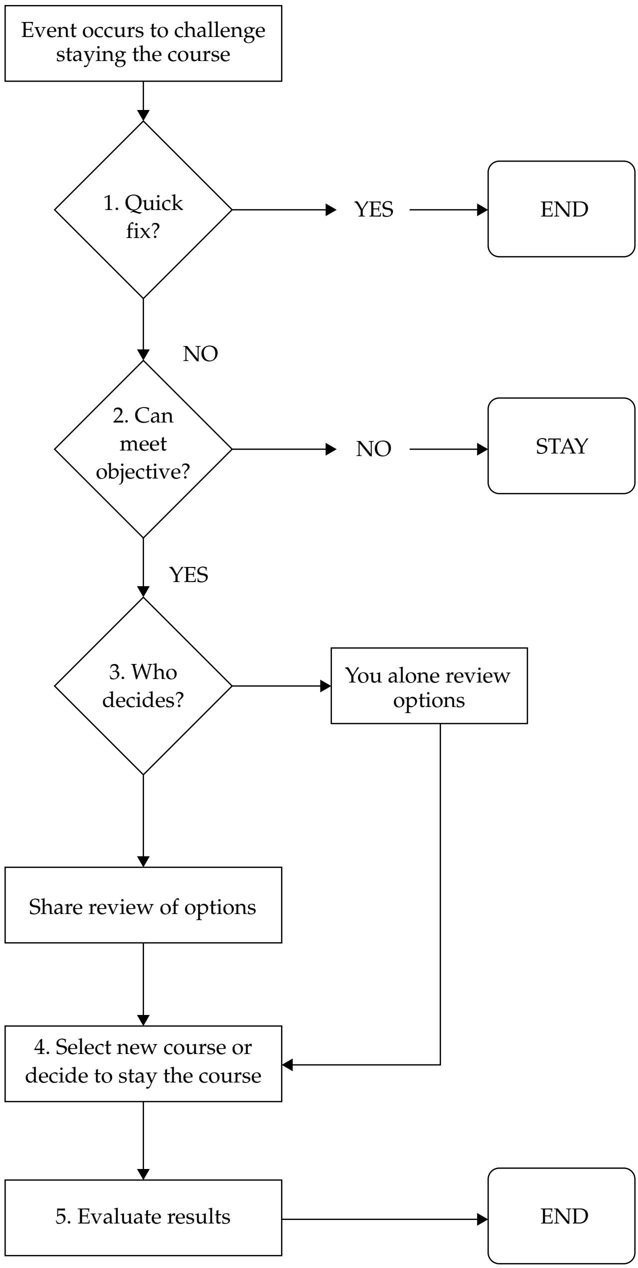
Tool 12.2 shows a five-step decision-making strategy to help you decide whether to stay with or depart from a prepared script. While this particular decision model is helpful to online facilitators, it can also be used by classroom trainers who are teaching from a scripted lesson plan. The first step is to identify whether or not there are any "quick fixes" available. It might be possible to give a short/brief answer to a question. Try giving a referral, reference, or resource to avoid taking class time. Offer to talk one-on-one outside of synchronous time, or use the "parking lot" technique and promise a more complete answer later in the class.

If a quick fix does not work, revisit the course objectives and key points to decide whether or not there is sufficient reason to stay on course. Ask yourself:

- Is the question irrelevant to the topic or current discussion of key points?
- Is the question not helpful—or does it even distract from the objective?
- Have you made a commitment to a client that would be violated by straying?
- Do you need to build to a prerequisite for future learning?
- Is the time too constrained to stray?

If a quick fix does not work and straying from prepared material might still meet course objectives, decide who makes the decision to stay or stray. There are three options. You make the decision as the e-facilitator because you are the only one who knows the big picture and is aware of constraints or expectations of the client/customer, or that you are running out of time. You can share decision making with the client or class participants because it is an easy choice (for example, take one longer break or two shorter breaks), in order to establish majority needs (two options, time for only one), or this is an established group that is used to making shared decisions. Finally, some facilitators would opt for allowing a decision to be made by default with no active decision making because it is easier for circumstances to decide, because fear of failure causes inaction, or because they lack the skill to make a proactive decision.

Tool 12.2. When to Depart from the Prepared Script



Next consider options for straying from a prepared script or lesson plan. Tool 12.3 lists eleven options that will slightly alter content or process—or make structural changes in drastic cases. Consider the tradeoffs, consequences, and costs of the choices and how they affect the outcome in light of culture and acceptability of cost to client. Use the checklist in the tool and put a check mark if each option has a consequence for the five questions at the right.

The next step is to select the path of least resistance and make a decision that is the best option. Following the option to stay or stray, evaluate the results of your decision to digress or stay the course by asking several questions. What was the reaction of the participants and the client? Did straying get the appropriate result? Was the objective met and were key points learned? Were the participants able to use their new knowledge and skills? Was it possible to achieve intended results? Was the cost of the tradeoff worth what was achieved by the digression? What were the tradeoffs for the digression or staying on course? What did you learn from this experience that you can use next time this class is presented?

Following Tool 12.3 is a case study to help you consider whether using this decision-making process is a useful tool in your situation.

NAVIGATION CASE STUDY SITUATION

Directions: Read the case study below and use the decision-making process in Tool 12.2 and Tool 12.3 to decide whether you will stay with the course as written or stray from the prepared materials.

It's the end of the first four-hour session of a synchronous five-module workshop. The workshop you are presenting is designed for intermediate to advanced participants. Only five of the fifteen participants can be described as intermediate or above. Several questions from the less-experienced participants indicate a lack of the basics. If you continue without addressing their needs, they will be lost for the remainder of the workshop. The five more advanced participants are getting bored with the pace. They publicly complain about the slow pace up until now. You are about one hour behind where the lesson plan suggests you should be at this point.

Tool 12.3. Options for Straying from a Prepared Script

Directions: Put a check mark beside any option that has a consequence for the five items at the right.

Categories of Options	Meet Objective?	Acceptable to Client?	Level of Resistance?	Cost?	Consequences?
Alter pace: faster, slower					
Different method: change group size, go to individual assignment, use interactive technique					
Give assignment, pre-work for next session					
Provide written materials (self-study) instead of lecturing					
Review ground rules and review and/or renegotiate the shared/unshared assumptions					
Have participants put a point in writing that captures different learning needs					
Make a summary, transition to next point					
Clarify request, digress, and present needed material					
Split the class and have another instructor facilitate the slower group, giving remedial instruction. Meet with different groups separately					
Renegotiate with client or contact					
Have participants in groups do one case study each instead of everyone doing all the cases					

Attendance at this workshop is a job requirement for all fifteen participants.

1. Are there quick fixes?
2. Revisit what you want to accomplish/the objective.
3. Select decision-making process (self, group, default).
4. Review options to stay or stray from the planned course.

Suggested Answers

1. Give an assignment or meet with participants offline. Create a resource page for frequently asked questions (FAQs).
2. The objective shows that the job requirement is for all fifteen participants to attend the training. It is also a requirement that prerequisites be met.
3. As to who makes the decision to stay or stray, you are ultimately responsible. You might consult with the participants' manager. Using the default, to ignore the problem, is not an option.
4. Options to stay or stray include using a slower pace to help the few or selecting different methods to help them. You could give an alternative assignment to the five or to the ten participants that is more suited to their experience level. Provide written materials or a tutorial to the ten participants. Try splitting the class for a specific period of time when using these different assignments.

Using this decision-making process to alter the course of a workshop might be appropriate. Also consider whether it would be appropriate to use some of the problem learner strategies from the next chapter.

CHAPTER 13

Handle Problem Learners Effectively

Chapter Objectives

- To decide whether or not a problem is caused by the content or the process of instruction
- To anticipate problem learners by using prevention strategies, such as setting ground rules
- To learn to ignore minor problem learner behaviors and to take corrective action when appropriate
- To use interactive training methods to redirect the focus of a problem learner
- To learn to use high-risk disciplinary strategies to correct problem learner behavior as a last resort
- To assess the effectiveness of problem learner strategies

Tool

- Problem Learner Strategies

Chapter Questions

- Why must trainers learn to deal with problem behavior?
- Why is it important to distinguish whether a problem learner's behavior originated from a training or a non-training issue?
- Why is it appropriate to ignore minor problem learner behaviors?
- What are some prevention strategies to avoid problem behaviors?
- What are some personal strategies to deal with problem learners?
- How can interactive training methods neutralize problem learner behavior?
- What are some appropriate disciplinary strategies to correct problem learner behavior?

Why Must Trainers Learn to Deal with Problem Behavior?

Most trainers have run across problem learners at some time during the course of conducting a training program. Dealing effectively with problem learners means that you must be willing to confront disruptive behavior assertively, be unwilling to allow anyone to disrupt the learning of others, and be unwilling to accept verbal or physical abuse from learners. Problem learners often show their displeasure with having to attend a mandatory training program prior to the beginning of a workshop. They can be heard complaining loudly to anyone who will listen or sulking quietly in the last row of the classroom. This chapter will help you decide when and how to deal with problem learners. If you take the approach that the learner is not the problem, but only the behavior being exhibited, then it is easier to encourage a learner to change his or her *behavior* than to change *who* he or she is.

Why Is It Important to Distinguish Whether a Problem Learner's Behavior Originated from a Training or a Non-Training Issue?

When confronting a problem learner, first decide whether the problem behavior has to do with a training issue, that is, something to do with the content or process of instruction. Or is the problem learner's behavior a non-training issue? For example, if two learners are disrupting others with a distracting side conversation, it is within your rights to resolve the problem by stating or restating ground rules about conversations. A non-training problem has to do with things that are beyond the content and process of instruction. For example, someone has withdrawn because he has a horrible cold and is on medication that makes him sleepy. Knowing whether problem behavior is a training or a non-training issue will help you select the right remedy for the problem. Sometimes knowing the cause of a problem will not make any difference in selecting the resolution, but it can help you to select the appropriate strategy.

Why Is It Appropriate to Ignore Minor Problem Learner Behaviors?

The first strategy to deal with a problem learner's behavior is to ignore it as a minor irritation. Often when participants become involved in the learning process, they stop misbehaving on their own. Think about who is bothered by the learner's problem behavior. If level of civility and decorum are not what you are used to, look around the room and decide whether other learners are put off or distracted by someone else's behavior. Sometimes people are rude to each other and everyone else, but they are used to that level of civility and just expect rude behavior from certain participants. If learning can still take place in that environment, momentarily ignoring this behavior may be the best strategy. The problem learner might be "testing" you, in which case ignoring rude behavior does not reward the participant by giving attention to bad behavior. However, if the problem learner's behavior is disrupting the learning of others, then it is your responsibility to do something about it.

What Are Some Prevention Strategies to Avoid Problem Behaviors?

Prior to the beginning of a workshop, check the class roster to identify any individuals who are known as disruptive. Contact the participant about the importance of the subject matter and how it relates to a business need; stress the personal benefit to be gained from attending the workshop. Ask for this person's personal objectives and request his or her help to reach the learning objectives before the workshop. When the workshop begins, set reasonable ground rules. Often collaboratively setting ground rules can gain the cooperation of disruptive learners. See additional suggestions in Chapter 3 about setting ground rules. Know who the "question askers" are, and ask for their participation before they interrupt. Separating known disruptive participants by designating prearranged seating can sometimes backfire and encourage confrontation rather than avoid it. It is often easier to allow participants to select their own seats and mix groups using some of the training strategies described later in this chapter.

What Are Some Personal Strategies to Deal with Problem Learners?

Prior to selecting any strategy to deal with problem learners, recognize your own biases and stress triggers. Don't be distracted by your biases, and especially don't take the problem behavior of learners personally. Predict success, not failure, in conducting a workshop by focusing on reaching learning objectives. It is easier to take corrective action to stay in control of the direction for the entire class than to watch the behavior of just a few. It also helps to maintain a long-term versus short-term perspective. Think about how much better you will feel at the end of the workshop when you've been successful in meeting the learning objectives.

How Can Interactive Training Methods Neutralize Problem Learner Behavior?

Often, changing the learning activity or pace of training can encourage a problem learner to redirect his or her energy in a positive direction. For example, use small groups or work in pairs to involve everyone in another aspect of the content. Ask a direct question of participants engaged in a side conversation, or ask the person next to the side-talkers a question to direct everyone's attention to that part of the classroom. If you use a direct question to engage a quiet person or someone who is not participating, call that person by name first, and after you have his or her attention, ask a question. Ask each person to write an application step, write a summary of learning points, or draw examples from his or her experience. By making this type of assignment, you change the pace of the workshop and redirect the attention of all learners.

Set a comfortable learning climate by acknowledging various points of view. Acknowledge the off-track learner's position and tie his or her point to the lesson, or have the learner tie it to the lesson. Don't be drawn into an argument; use reversed or redirected questions to move along. How to use these questions is further described in Chapter 5.

What Are Some Appropriate Disciplinary Strategies to Correct Problem Learner Behavior?

Keep in mind that disciplinary strategies are higher-risk strategies than the others mentioned in this chapter. Use them as a last resort, since after using several of these strategies, you will have few options left to neutralize problem behavior. Some disciplinary strategies include:

- Stop talking until interrupters or side conversations stop.
- Use nonverbal cues, such as moving closer to the disruptive learners, move away from ramblers, make eye contact with side-talkers, nod or shake your head to encourage or discourage behaviors.
- Directly ask for silence or compliance with your directions.
- Confront problem behavior assertively, during or after the training. Never embarrass or put down learners.
- Acknowledge acceptable behavior with positive reinforcement.

Since there are many strategies at your disposal, first try the lowest-risk strategy, then escalate the intervention based on how it worked or didn't work. Sometimes a combination of strategies works best, so try out a couple of them, assess the effect, and start over with new strategies as needed. Talk with your manager to determine your level of authority to remove a disruptive participant from a class. This might include the ability to bar someone from training or ask him or her to leave and return to work.

Following are three examples of typical problem learner behaviors and how to assess and deal with each using the strategies in this chapter.

Side Conversations

You are conducting a session for experienced employees. At the beginning of each session in the morning and after the breaks and after lunch, two participants in the rear of the classroom continue their conversation several minutes into the class presentations.

If you have ignored this minor problem at the beginning of the class, it is likely to continue. Since side conversations are often distracting others from concentrating and learning, it is appropriate to actively do something to curtail this behavior. In assessing the situation, you may decide that the cause can be a training issue if no ground rules were set at the beginning of the workshop. However, the cause of their behavior could also be non-training if the two participants are acquaintances who are having a personal discussion. Regardless of the cause, do not take this behavior personally, but take direct action using a training strategy, such as asking participants to put a point in writing, summarize key points made prior to the break, or write some questions that would help clarify a point made prior to the break. Then sort participants into new small groups to answer questions or discuss what they have written. Forming new groups will separate the two participants having a side conversation, and it will appear that the new activity is a planned part of the workshop. If this strategy fails to eliminate the side conversations, consider talking directly to the two participants during a break.

Space Cadet

One participant in the class is constantly gazing into space and doodling on the handout pages. His attention seems to drift from the subject under discussion. He has a hard time keeping up with the rest of the class.

Without talking directly with this participant, it would be difficult to tell whether this is a training or non-training issue. If this person is sleep deprived, it might be easier to ignore his behavior. However, he is having a hard time keeping up with the rest of the class, so you need to take some action. Perhaps involving this participant through questioning about the topic would help keep his attention. Consider giving the class an individual activity and assist him with one-on-one coaching while others work independently.

Experienced Learners

Three learners in your class are quite experienced computer users. They seem to be way ahead of everyone else in the class. They are frequently on another screen and occasionally get lost when they go too far ahead on their own. Then they disrupt the rest of the class with questions that would have been unnecessary if they had been more patient.

Since the experienced users are being disruptive, you must take some action. The cause might be that they are too experienced for the content and pace of the class. Since they are going off on their own and disrupting the class, however, you need to address the problem behavior. Consider giving experienced learners additional, more complex examples, or some activities more suited to their level of experience. Ask them to coach other learners who need help. You might also consider your own need to have everyone on the same screen at the same time. Consider allowing participants to go at their own pace when completing examples following your demonstration. Make clear at the beginning of class that there will be time for independent practice and coaching.

Some other strategies are given in Tool 13.1.

Most of this book focuses on what the trainer does in the classroom to achieve great training delivery. Some of the problem learner strategies describe how to prepare for a class to avoid these problems. Chapter 14 deals with additional preparation, administration, and follow-up issues to encourage great training delivery.

Tool 13.1. Problem Learner Strategies

Prevention Strategies

- Inform the known disruptive participants about the subject matter *before* the workshop.
- Set ground rules at the beginning of the workshop.
- Know who the "question askers" are and ask for their participation before they interrupt.
- Confront the known disruptive participants and *ask* for their help before the workshop.

Personal Strategies

- Identify the *behavior* as an issue or a problem.
- Ignore behavior that is not disruptive.
- Recognize your own biases and stress triggers.
- Don't take it personally.
- Predict your success, not your failure.
- Maintain a long-term versus short-term perspective.
- Concentrate on reaching learning objectives.
- Take action to stay in control.

Training Method Strategies

- Set a comfortable learning climate by acknowledging various points of view.
- Use small groups or work in pairs to involve everyone in the content.
- Ask a direct question of talkers or quiet non-participants.

Tool 13.1. Problem Learner Strategies, Cont'd

- Ask a direct question of the person *next to* the disruptive participant.
- Acknowledge the off-track learner's position and tie his or her point to the lesson.
- Don't get drawn into an argument; use reversed or redirected questions to move along.
- Rescue a participant who was "shut down" by another's interruption or put-down.
- Ask each person to make an application step or draw from his or her experience.
- Ask each person to write a summary of learning points.

Disciplinary Strategies

- Stop talking until interrupters stop.
- Use nonverbal cues: move closer to the disruptive learners, move away from ramblers, make eye contact with side-talkers, nod your head to encourage or discourage behaviors.
- Directly ask for silence or compliance with your directions.
- Confront problem behavior assertively during or after the training. Never embarrass or put down learners.
- Acknowledge acceptable behavior with positive reinforcement.

CHAPTER 14

What Trainers Need to Do Outside the Classroom

Chapter Objectives

- To learn how to build a partnership with managers and supervisors
- To determine ways to work with course designers
- To learn to complete administrative tasks
- To learn to prepare for instruction
- To learn how to follow up after training

Tools

- Administrative Tasks Checklist
- Trainer Course Preparation Checklist
- Room Set-Up Options
- Post-Training Follow-Up Tasks Checklist

Chapter Questions

- What skills are essential for building a partnership with the managers and supervisors of learners?
- When and how should a trainer recommend changes in course design?
- What are the typical administrative tasks performed by trainers?
- What does a trainer need to do to prepare for instruction?
- What are some typical follow-up tasks to perform after training?

What Skills Are Essential for Building a Partnership with the Managers and Supervisors of Learners?

Trainers use a variety of strategies and tactics to promote learning transfer to the job before, during, and after the course. In order for learning to transfer to the workplace, you must build the following skills:

- Set objectives with the participants' managers that are based on needs defined with the manager.
- Customize course content to meet the participants' needs.
- Use adult learning methods to facilitate content that addresses the participants' real issues.
- Provide appropriate practice and feedback to learners.
- Provide follow-up information to assist coaching and support by the participants' managers.
- Assist the managers in evaluating the transfer of learning and bottom-line results of training.

See Table 14.1, which shows the partnership between trainer, managers or supervisors of learners, and the learner.

Table 14.1. Three-Way Partnership

	Supervisor/Manager	Trainer	Learner
BEFORE	Set standards of performance Define/assess training needs with trainer Define target population Establish expectations and objectives with trainer Become familiar with program content Introduce employee to training program Communicate need for training to the employee Clarify employee expectations following training Anticipate resistance to change	Define/assess training needs with supervisor Analyze target population Set expectations and objectives with supervisors Develop program content to meet agreed-on objectives Provide overview/pilot of program for supervisors Schedule training with consideration for workload and organization's needs	Identify personal developmental needs Offer input on training design Set objectives with the manager Complete pre-work assignments
DURING	Communicate support for training Assure attendance of scheduled employees Do not interrupt the training Prepare the work environment to use new learning Compensate for workload while employee is at training	Use adult learning principles Address real issues and problems (WIIFM) Stress application to job Evaluate learning (Were objectives met?) Provide appropriate practice and feedback	Show up Set and share personal objectives Participate and practice Share relevant experience Keep an open mind Seek clarification Anticipate performance sanctions
AFTER	Meet with employee to discuss use of new knowledge, skills, and attitudes (KSA) Provide follow-up coaching and positive reinforcement Remove work environment obstacles to application of learning Include new KSAs in performance appraisal Participate with trainers to evaluate results of training Publish successes	Provide supervisors with information to assist in follow-up coaching and support Validate content with observation of use of skills on the job Evaluate results of changed behavior with supervisors Review and revise training as needed Publish successes	Review action plan with supervisor Be willing to change Practice new ways Ask for help Identify ongoing needs

When and How Should a Trainer Recommend Changes in Course Design?

Trainers ought to assess the effectiveness of a course by reviewing the content and process of the courses they present and make specific recommendations for course changes to the course designer and training manager. To be comfortable with this task, you must be aware of the variety of factors that influence the effectiveness of training and understand when to make a recommendation to change a course. Further, you need to be aware of how to state recommendations to avoid a defensive reaction, as well as understand course design principles.

Supporting skills to make recommendations include identifying appropriate changes to make a course more effective, knowing when a course does not match the job and is out-of-date, and the ability to tactfully make appropriate recommendations for course changes. (How to complete a needs assessment and design training course are the subjects of other books in *The Skilled Trainer Series.*)

What Are the Typical Administrative Tasks Performed by Trainers?

Although trainers consider themselves to be professionals and not responsible for administrative details of a training program, you must consider them and verify that the administrative tasks that impact a workshop have been completed. Tool 14.1 shows the many administrative tasks to consider.

What Does a Trainer Need to Do to Prepare for Instruction?

The type of preparation you need to do prior to conducting a workshop will depend on several factors:

- Whether the course is new or repeated for you
- How often the course is presented
- How many participants will attend the training
- How difficult the content is to facilitate
- Whether you are also the course designer

Tool 14.1. Administrative Tasks Checklist

Directions: Use the tasks on this list to complete the administrative items associated with presenting a workshop.

____ Receive a roster of participants and sign-in sheet.

____ Collect and correct any pre-workshop assignments.

____ Collect or receive handout materials, name tents, and evaluation forms for the workshop.

____ Verify classroom location.

____ Check on room set-up to see that it compliments the instructional process.

____ Order audiovisual equipment.

____ Locate the correct video, media, or other slides.

____ Arrange or check on food and beverages for the participants.

____ Check on supplies (markers, pens, pencils, highlighters, stapler, scissors, etc.).

____ Get a copy of a "banquet event order" and map to the classroom for off-site classes.

____ Check on needs of out-of-town participants.

____ Verify that workshop confirmation notices were sent to participants.

- Whether or not it is important that the course content be facilitated in a standardized manner
- What type of room set-up is appropriate to encourage the learners' participation

The best preparation for training a new course is to sit through the course at least once as a participant. Then review the lesson plan or leader's guide and become familiar with the course from the trainer's point of view. Review the preparation checklist in Tool 14.2 and consider which of these items require preparation before each presentation of the course. Tool 14.3 shows different types of room set-ups that encourage or discourage learner participation. The three styles on the left side of the page (theater, classroom, and chevron) tend to *discourage* small-group interaction and focus the learners' attention on the instructor in the front of the room. The three styles on the right side of the page (U shape, conference, and rounds) tend to *encourage* small-group interaction and focus the learners' attention on each other.

What Are Some Typical Follow-Up Tasks to Perform After Training?

Typical tasks to perform following the presentation of a workshop are identified in Tool 14.4. Keep in mind that these tasks vary depending on the type of administrative support provided in your organization.

Additional books in *The Skilled Trainer Series* are good sources to learn more about course design and training evaluation.

Tool 14.2. Trainer Course Preparation Checklist

Directions: Use this checklist each time you prepare to teach a session of any course. Modify the checklist when repeat presentations of the same course are made.

____ Review the business need for the course. Talk to the manager or supervisor of the participants and clarify expectations for the training.

____ Identify the intended target population and identify any changes to be made for this session of the workshop.

____ Identify potential problem learners and consider some of the preparation strategies from Chapter 13.

____ Check on, collect, and correct pre-work to be completed by the participants.

____ Verify that all administrative tasks have been completed.

____ Review the content to be completely familiar with it and identify any changes that may have occurred in the workplace since the course was developed.

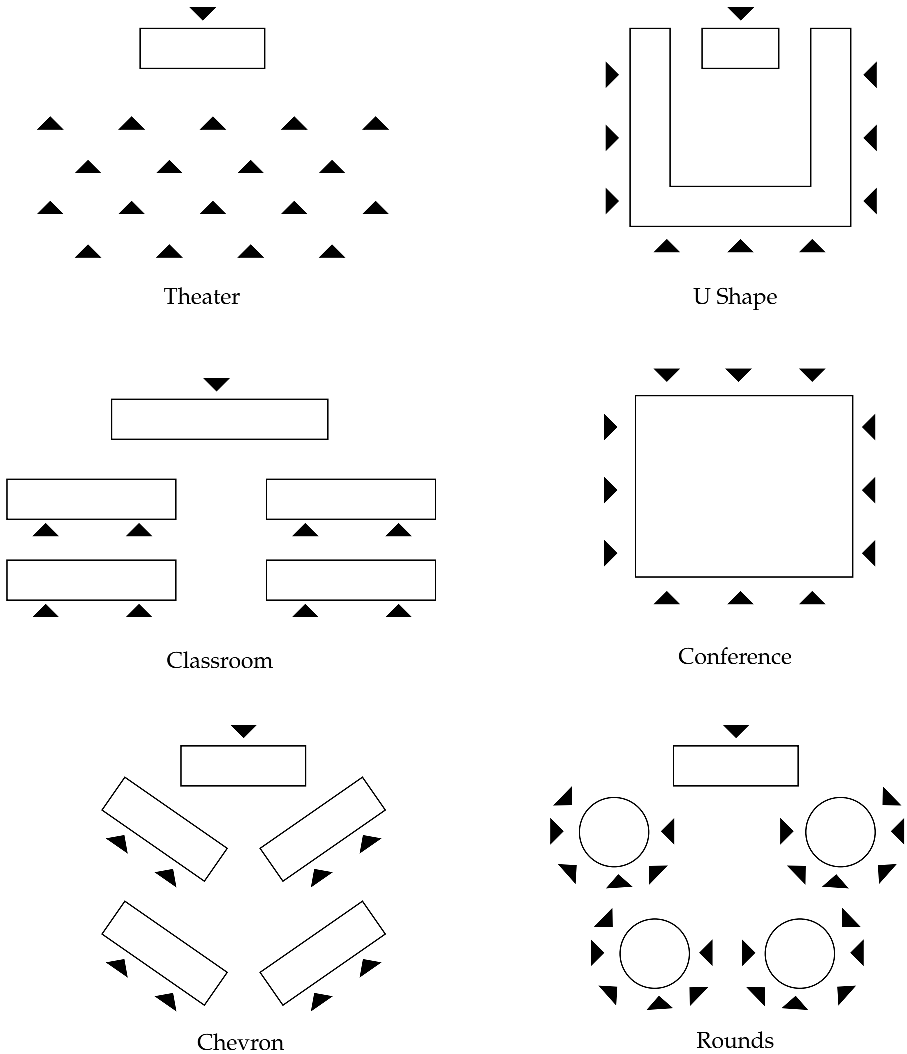
____ If case studies and exercises have been customized for this group, verify intended answers with the course designer.

____ Review the activities to be completely familiar with the processing of each of them. Prepare additional questions to process activities and promote interaction.

____ Review the opening activity to be sure it is low risk for this group, will encourage participation by all, and will be seen as related to the content of the course by this group.

____ Prepare questions that will have the participants summarize major units of content and the entire course.

Tool 14.3. Room Set-Up Options



Note: Allow 2 feet of table space per person.

Tool 14.4. Post-Training Follow-Up Tasks Checklist

Directions: Following a session of a workshop, complete this checklist:

____ Collect evaluation forms or encourage online completion of the reaction sheet.

____ Collect and correct tests taken during the training. Record/report scores.

____ Clean up classroom and return unused supplies or materials.

____ Secure audiovisual equipment.

____ Complete a summary of workshop evaluations.

____ Address questions raised, but not answered during the workshop and provide answers to participants.

____ Confirm attendance was completed in the LMS.

____ Provide certificates of attendance.

____ Contact the manager or supervisor of the participants to suggest how action plans can be discussed to implement skills taught during the workshop.

____ Complete a travel and/or expense report if appropriate.

RESOURCES

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GLOSSARY

Case study. A case study is a description of an actual or made-up situation, which the learner examines to increase his or her knowledge and skills or to influence his or her attitudes.

Climate setting. The trainer creates a climate that honors an adult's prior knowledge, skills, and attitudes. Learners are treated as colleagues and partners in the learning process.

Demonstration. The act of showing another person(s) how to complete a task in a specific manner.

Facilitator. A person who leads a meeting or training program and encourages the group to develop content, provide answers, or solve a problem without over-directing the group.

Inventory. A formal or informal list of questions or statements for an individual to choose preferred answers. Selected answers are interpreted to provide feedback.

Learning objective. The purpose or goal for a training activity that is written from the learner's point of view, contains a specific, descriptive behavior, a condition under which the behavior is completed, and a minimum level of achievement.

Problem learner. A person attending a training program whose behavior detracts from learning.

Return demonstration. Following a demonstration from the trainer, learners repeat what they have seen the trainer complete.

Role play. A training method that allows learners to practice skills or to empathize with another's situation by acting out a prescribed role.

Session starter. A quick activity at the beginning of a lesson to include everyone, demonstrate the learner's active role; is low risk and relevant to the content of the lesson.

Short-answer exercises. A learning activity that requires a brief answer from learners.

Skill performance checklist. A checklist of skills matched to learning objectives and used to observe a person demonstrate competency.

Training method. An activity that promotes learning.

Training style. The manner in which a trainer encourages learning. Trainer styles can be directive to facilitative.

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Jean Barbazette is the president of The Training Clinic, a training and consulting firm she founded in 1977. Her company focuses on training trainers throughout the United States for major profit, non-profit, and government organizations. The Training Clinic has three international licensees in the Netherlands, Hungary, and Colombia. Prior books include *Successful New Employee Orientation* (2nd ed.) (Pfeiffer, 2001); *The Trainer's Support Handbook* (McGraw-Hill, 2001); *Instant Case Studies* (Pfeiffer, 2003) *The Trainer's Journey to Competence* (Pfeiffer, 2005) and *Training Needs Assessment* (Pfeiffer, 2006). She is a frequent contributor to *ASTD Training & Development Sourcebooks*, *McGraw-Hill Training & Performance Sourcebooks*, and *Pfeiffer Annuals*.

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System Requirements

PC with Microsoft Windows 98SE or later
Mac with Apple OS version 8.6 or later

Using the CD With Windows

To view the items located on the CD, follow these steps:

1. Insert the CD into your computer's CD-ROM drive.
2. A window appears with the following options:

   Contents: Allows you to view the files included on the CD-ROM.

   Software: Allows you to install useful software from the CD-ROM.

   Links: Displays a hyperlinked page of websites.

   Author: Displays a page with information about the Author(s).

   Contact Us: Displays a page with information on contacting the publisher or author.

   Help: Displays a page with information on using the CD.

   Exit: Closes the interface window.

If you do not have autorun enabled, or if the autorun window does not appear, follow these steps to access the CD:

1. Click Start -> Run.
2. In the dialog box that appears, type d:\start.exe, where d is the letter of your CD-ROM drive. This brings up the autorun window described in the preceding set of steps.
3. Choose the desired option from the menu. (See Step 2 in the preceding list for a description of these options.)

In Case of Trouble

If you experience difficulty using the CD-ROM, please follow these steps:

1. Make sure your hardware and systems configurations conform to the systems requirements noted under "System Requirements" above.
2. Review the installation procedure for your type of hardware and operating system.

It is possible to reinstall the software if necessary.

To speak with someone in Product Technical Support, call 800-762-2974 or 317-572-3994 M-F 8:30 a.m. – 5:00 p.m. EST. You can also get support and contact Product Technical Support through our website at www.wiley.com/techsupport.

Before calling or writing, please have the following information available:

- Type of computer and operating system
- Any error messages displayed
- Complete description of the problem

It is best if you are sitting at your computer when making the call.

Pfeiffer Publications Guide

This guide is designed to familiarize you with the various types of Pfeiffer publications. The formats section describes the various types of products that we publish; the methodologies section describes the many different ways that content might be provided within a product. We also provide a list of the topic areas in which we publish.

FORMATS

In addition to its extensive book-publishing program, Pfeiffer offers content in an array of formats, from fieldbooks for the practitioner to complete, ready-to-use training packages that support group learning.

FIELDBOOK Designed to provide information and guidance to practitioners in the midst of action. Most fieldbooks are companions to another, sometimes earlier, work, from which its ideas are derived; the fieldbook makes practical what was theoretical in the original text. Fieldbooks can certainly be read from cover to cover. More likely, though, you'll find yourself bouncing around following a particular theme, or dipping in as the mood, and the situation, dictates.

HANDBOOK A contributed volume of work on a single topic, comprising an eclectic mix of ideas, case studies, and best practices sourced by practitioners and experts in the field.

An editor or team of editors usually is appointed to seek out contributors and to evaluate content for relevance to the topic. Think of a handbook not as a ready-to-eat meal, but as a cookbook of ingredients that enables you to create the most fitting experience for the occasion.

RESOURCE Materials designed to support group learning. They come in many forms: a complete, ready-to-use exercise (such as a game); a comprehensive resource on one topic (such as conflict management) containing a variety of methods and approaches; or a collection of like-minded activities (such as icebreakers) on multiple subjects and situations.

TRAINING PACKAGE An entire, ready-to-use learning program that focuses on a particular topic or skill. All packages comprise a guide for the facilitator/trainer and a workbook for the participants. Some packages are supported with additional media—such as video—or learning aids, instruments, or other devices to help participants understand concepts or practice and develop skills.

- *Facilitator/trainer's guide* Contains an introduction to the program, advice on how to organize and facilitate the learning event, and step-by-step instructor notes. The guide also contains copies of presentation materials—handouts, presentations, and overhead designs, for example—used in the program.

- *Participant's workbook* Contains exercises and reading materials that support the learning goal and serves as a valuable reference and support guide for participants in the weeks and months that follow the learning event. Typically, each participant will require his or her own workbook.

ELECTRONIC CD-ROMs and web-based products transform static Pfeiffer content into dynamic, interactive experiences. Designed to take advantage of the searchability, automation, and ease-of-use that technology provides, our e-products bring convenience and immediate accessibility to your workspace.

METHODOLOGIES

CASE STUDY A presentation, in narrative form, of an actual event that has occurred inside an organization. Case studies are not prescriptive, nor are they used to prove a point; they are designed to develop critical analysis and decision-making skills. A case study has a specific time frame, specifies a sequence of events, is narrative in structure, and contains a plot structure—an issue (what should be/have been done?). Use case studies when the goal is to enable participants to apply previously learned theories to the circumstances in the case, decide what is pertinent, identify the real issues, decide what should have been done, and develop a plan of action.

ENERGIZER A short activity that develops readiness for the next session or learning event. Energizers are most commonly used after a break or lunch to stimulate or refocus the group. Many involve some form of physical activity, so they are a useful way to counter post-lunch lethargy. Other uses include transitioning from one topic to another, where "mental" distancing is important.

EXPERIENTIAL LEARNING ACTIVITY (ELA) A facilitator-led intervention that moves participants through the learning cycle from experience to application (also known as a Structured Experience). ELAs are carefully thought-out designs in which there is a definite learning purpose and intended outcome. Each step—everything that participants do during the activity—facilitates the accomplishment of the stated goal. Each ELA includes complete instructions for facilitating the intervention and a clear statement of goals, suggested group size and timing, materials required, an explanation of the process, and, where appropriate, possible variations to the activity. (For more detail on Experiential Learning Activities, see the Introduction to the *Reference Guide to Handbooks and Annuals*, 1999 edition, Pfeiffer, San Francisco.)

GAME A group activity that has the purpose of fostering team sprit and togetherness in addition to the achievement of a pre-stated goal. Usually contrived—undertaking a desert expedition, for example—this type of learning method offers an engaging means for participants to demonstrate and practice business and interpersonal skills. Games are effective for team-building and personal development mainly because the goal is subordinate to the process—the means through which participants reach decisions, collaborate, communicate, and generate trust and understanding. Games often engage teams in "friendly" competition.

ICEBREAKER A (usually) short activity designed to help participants overcome initial anxiety in a training session and/or to acquaint the participants with one another. An icebreaker can be a fun activity or can be tied to specific topics or training goals. While a useful tool in itself, the icebreaker comes into its own in situations where tension or resistance exists within a group.

INSTRUMENT A device used to assess, appraise, evaluate, describe, classify, and summarize various aspects of human behavior. The term used to describe an instrument depends primarily on its format and purpose. These terms include survey, questionnaire, inventory, diagnostic, survey, and poll. Some uses of instruments include providing instrumental feedback to group members, studying here-and-now processes or functioning within a group, manipulating group composition, and evaluating outcomes of training and other interventions.

Instruments are popular in the training and HR field because, in general, more growth can occur if an individual is provided with a method for focusing specifically on his or her own behavior. Instruments also are used to obtain information that will serve as a basis for change and to assist in workforce planning efforts.

Paper-and-pencil tests still dominate the instrument landscape with a typical package comprising a facilitator's guide, which offers advice on administering the instrument and interpreting the collected data, and an initial set of instruments. Additional instruments are available separately. Pfeiffer, though, is investing heavily in e-instruments. Electronic instrumentation provides effortless distribution and, for larger groups particularly, offers advantages over paper-and-pencil tests in the time it takes to analyze data and provide feedback.

LECTURETTE A short talk that provides an explanation of a principle, model, or process that is pertinent to the participants' current learning needs. A lecturette is intended to establish a common language bond between the trainer and the participants by providing a mutual frame of reference. Use a lecturette as an introduction to a group activity or event, as an interjection during an event, or as a handout.

MODEL A graphic depiction of a system or process and the relationship among its elements. Models provide a frame of reference and something more tangible, and more easily remembered, than a verbal explanation. They also give participants something to "go on," enabling them to track their own progress as they experience the dynamics, processes, and relationships being depicted in the model.

ROLE PLAY A technique in which people assume a role in a situation/scenario: a customer service rep in an angry-customer exchange, for example. The way in which the role is approached is then discussed and feedback is offered. The role play is often repeated using a different approach and/or incorporating changes made based on feedback received. In other words, role playing is a spontaneous interaction involving realistic behavior under artificial (and safe) conditions.

SIMULATION A methodology for understanding the interrelationships among components of a system or process. Simulations differ from games in that they test or use a model that depicts or mirrors some aspect of reality in form, if not necessarily in content. Learning occurs by studying the effects of change on one or more factors of the model. Simulations are commonly used to test hypotheses about what happens in a system—often referred to as "what if?" analysis—or to examine best-case/worst-case scenarios.

THEORY A presentation of an idea from a conjectural perspective. Theories are useful because they encourage us to examine behavior and phenomena through a different lens.

TOPICS

The twin goals of providing effective and practical solutions for workforce training and organization development and meeting the educational needs of training and human resource professionals shape Pfeiffer's publishing program. Core topics include the following:

Leadership & Management
Communication & Presentation
Coaching & Mentoring
Training & Development
e-Learning
Teams & Collaboration
OD & Strategic Planning
Human Resources
Consulting