THE TRAINING DESIGN MANUAL

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THE TRAINING DESIGN MANUAL

The complete practical guide to creating effective and successful training programmes

2nd edition

Tony Bray

KOGAN PAGE

London and Philadelphia

Publisher's note

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Contents

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www.koganpage.com/resources/books/TrainingDesignManual
password: TD1917

1

Introduction

1. Welcome
2. The benefits of good design
3. Structure of the book
4. List of tasks
5. Using the templates
6. Topic selection

1. Welcome

Welcome to the second edition of *The Training Design Manual: The complete practical guide to creating and delivering effective and successful training programmes.*

You may be wondering if you should add this manual to your already extensive library of learning resources. If you can answer 'Yes' to any of these questions then you should be taking this book away with you:

- I have been delivering training courses which other people have designed, and I'd like to be able to do it myself. Yes/No.
- I have been told that I'll soon be asked to design a course and I haven't a clue where to start. Yes/No.
- I am an experienced training course designer and perhaps feel the need to refresh my existing skills. Yes/No.
- I've designed many courses but, if I'm honest, several are a bit 'jaded' or need re-energizing.

- I am taking on a new role as a training 'consultant' and want to be able to project a more professional image with my client departments. Yes/No.

Helping people to acquire new knowledge, skills or behaviours, or to build their confidence and tackle previously daunting tasks, is a real privilege which everyone in the training profession shares. No matter how the training is delivered, at some stage someone will have had to sit down and plan *what content or course material* will be covered, the *order* in which it's to be done and exactly *how* it's to be delivered. All the basics of good training design. That's what this book will give you. It will take you through a step-by-step design process, presented in a user-friendly and practical way.

2. The benefits of good design

Please take a few minutes to think back on the training courses you've attended… then think of the best one. Please write down five things that made it so special. At least one of the items you've written will describe the trainer. You may have used words like:

- knowledgeable;
- organized;
- inspirational;
- inclusive;
- focused;
- approachable.

The list could go on and on. We all recognize the importance of a good trainer or teacher to make any subject come alive. But the focus of this book is not on the trainer but on the *design* of the training, so let's look at some of the other items you've written.

Your list may include:

- well structured;
- varied training methods;
- logical flow;
- used appropriate models or concepts;
- ideas I can take back and use straight away;
- appropriate balance of theory and practice;
- good handouts, visual aids or workbooks.

This list, which could also go on and on, clearly shows the benefits of good design. It's rather like the old saying: you can't make a silk purse out of a sow's ear. Given a well-designed course, even an average trainer can deliver an acceptable learning experience. But if you start with a poorly designed course, you need an exceptional trainer to turn it into anything worthwhile.

3. Structure of the book

The book takes you through the complete journey, starting with defining the learning needs, and ending with the existing programme being reviewed some time after its launch. Like every good training course, each chapter contains elements of theory interleaved with practical exercises, where you get the opportunity to try it out on your own course design project.

To make the process even more effective we have provided six online design templates which you can use to record your ideas as we progress through the book, so that, by the end, you have a complete course design. The templates plot the journey in the six main chunks that comprise the DESIGN process, which we'll introduce in Chapter 2. There are also some examples of materials or course peripherals which are available online.

As with most other subjects, there is a wealth of information available on the internet which you can easily access using the popular search engines. To avoid cluttering the text with endless lists of websites we have provided only those which you may not readily be aware of, for example in the chapter dealing with diversity and accessibility.

4. List of tasks

We made a conscious decision to make this book participative instead of being just a good read because we believe that participation is one of the cornerstones of designing training that works. To make the participation *meaningful* [another of our cornerstones] we would strongly suggest that, as you work through the book, you focus on a real piece of training design you have to do.

Throughout the book there are 62 tasks, starting with choosing the topic you wish to work with, and ending with a review some time after the course was launched on its continued effectiveness and relevance. Of course, you don't have to do them all, just those which are relevant to you, so pick and mix as you go!

Step D – Define the learning needs

Step E – Explore the learning options

Step S – Structure the learning

Step I – Initiate pilots

Step G – Go live

Step N – Now review and re-launch

5. Using the templates

If you do intend using the book to build up a complete design, this is the time to start:

- You can access the online materials on the Kogan Page website.
- Find 'Template D – Define the learning needs'.
- Copy it to your drive and rename it.
- For example, if you're developing a recruitment and selection course you might rename it: 'Rec & Sel. Template D – Define learning needs'.
- Keep the file open and, as we come to appropriate tasks in Chapters 2 to 5, simply enter your responses in the appropriate sections.
- Templates E to N are introduced in the chapters they relate to.

From now on, we will only give this reminder about opening a new template at the beginning of those chapters which require you to copy a new template. Anyway, let's show you how it works, using the first task as an example.

6. Topic selection

If you have a course to design soon then use the tools and techniques in the book on the actual design. That way you get to grasp the theory and design a course at the same time. That'd be novel, wouldn't it? Doing some real work while having some training.

Here's your first task. Please take a few minutes to identify the topic, course, or part of a course on which you will focus as we progress through the book. You might wish to specify:

- the topic;
- the target audience;
- the maximum duration.

After each task you'll see a prompting text box like this:

Template D: **Define the learning needs.**
Task D1: **Topic selection.**
Duration: **15 minutes.**

As you open the template you'll see the task heading, a prompt showing where to record your ideas, and some examples or suggestions, *shown in italic*, which may help you. It looks like this:

TEMPLATE D – DEFINE THE LEARNING NEEDS
TASK D1 – TOPIC SELECTION

The topic, target audience, and duration of the course on which I will focus as I progress through the book are:

For example: a two-day Recruitment and Selection course for line managers.

Simply record your ideas under Task D1 in Template D, then save the file before moving on. As you work through the book you'll gradually develop a complete set of all six templates.

2

Designing top-down and bottom-up

1. The DESIGN process

This chapter explores three important aspects of design:

- a six-step DESIGN process for managing any training design project;
- designing top-down – designing training for multi-sites or global organizations;
- designing bottom-up – focusing on the needs of individual delegates so that everyone can participate fully.

DESIGN is a logical process which you can apply to any training programme, no matter what scale you're operating at. First of all, let's introduce you to the DESIGN process.

The DESIGN model

D	define the learning needs	3 – The training design project
		4 – Formal learning needs analysis
		5 – Team-based needs analysis
E	explore the learning options	6 – Explore the learning options
		7 - How people learn
		8 – Develop your proposal
S	structure the learning	9 – Be a STAR designer
		10 – Designing more complex activities
		11 – Design each session
		12 – Blended learning
		13 – Sights and sounds
		14 – Design course materials
I	initiate pilot events	15 – Select and manage the venue
		16 – Train the trainers
		17 – Pilot the course
G	go live	18 – Go live
N	now review and re-launch	19 – Review and re-launch
		20 – The power of one per cent

Figure 2.1 The DESIGN model

Step One – Define the learning needs

The purpose of Step One is to:

- define, in consultation with the sponsor, the human performance requirements in terms of learning needs;
- identify constraints, localization issues and budget limits;
- validate any existing needs analysis.

Please see Chapters 3 to 5 for more detail on Step One.

Step Two – Explore the learning options

The purpose of Step Two is to:

- confirm that a learning solution is appropriate;
- create an outline proposal highlighting options and the preferred course of action.

Please see Chapters 6 to 8 for more detail on Step Two.

Step Three – Structure the learning

The purpose of Step Three is to:

- design the overall flow of the training;
- gain the sponsor's agreement to the design.

Please see Chapters 9 to 14 for more detail on Step Three.

Step Four – Initiate pilot programmes

The purpose of Step Four is to:

- turn the agreed design proposal into learning products ready for testing in the pilot/test phase.

Please see Chapters 15 to 17 for more detail on Step Four.

Step Five – Go live

The purpose of Step Five is to:

- move a newly designed and tested product into sustainable delivery.

Please see Chapter 18 for more detail on Step Five.

Step Six – Now review and re-launch

The purpose of Step Six is to:

- review the continued relevance and effectiveness of the learning / training programme, and modify as appropriate.

Please see Chapters 19 and 20 for more detail on Step Six.

2. Designing top-down

Recent years have seen amazing changes in the way that many businesses operate, brought about through mergers, acquisitions and alliances, coupled with the explosion in the capability to exchange data electronically through the internet and intranets. For many training designers the advent of truly global operations presents many opportunities, including:

- The ability to achieve cost savings through economies of scale.
- Because of the wider potential markets for any particular training programme it's possible to design and stage programmes which any one company might not be able to justify.
- By pooling training budgets from worldwide operating companies there are opportunities to develop programmes hitherto thought too costly.
- 'Virtual' teams can enable designers to call upon the expertise of fellow professionals worldwide, and so share knowledge and expertise on a previously unheard-of scale.
- Sharing development tasks across the world reduces development lead-times.
- Exchanging data electronically gives the opportunity to share existing course-ware and design materials between operating companies, so potentially reducing design costs.
- The easy sharing of information and course materials means that important messages can be delivered to a worldwide audience in a very short space of time.

So it all sounds very positive… but 'there must be some downsides' I hear you say. And of course there are, including:

- The traditional 'not invented here' resistance to courses designed somewhere else still applies.

- Operating companies still like to give any training programme a local ‘spin’ to reflect the conditions in their culture and market.
- Local market forces will drive different priorities for the development and delivery of training programmes. What one country may see as ‘top priority’ may be second or third elsewhere.
- It’s essential to design in the capability to switch languages easily in any aspect of the course.
- A course designed for the UK market may need to be subtly amended for delivery in mainland Europe, more drastically modified for the North American market and need major surgery for the Far East. We’re talking about cultural issues here, not just language.
- Forming a ‘virtual’ team may be relatively easy but getting people to commit to timescales, and then deliver on them, may be harder.

On balance there are more advantages than disadvantages, which is just as well because the corporate culture will ‘encourage’ you to work with your colleagues across the globe. If you work in a large company you’ll be amazed at the range of course designs already available from other departments or sites. All you have to do is ask for them. And remember – there’s only one thing worse then reinventing the wheel... and that’s paying a consultant to do it!

To develop a programme suitable for global markets is a complex process and we suggest you use the DESIGN process to give a standard, logical format you can work through no matter where you are located. If you’re intending to design a course for a specific country you’ll be well advised to consult with local staff to get a real flavour of what works, or what is not acceptable.

Please take a few minutes to consider how your design might be influenced by any top-down pressures within your organization, and record them in Template D.

Template D:	**Define the learning needs.**
Task D2:	**Designing top-down.**
Duration:	**30 minutes.**

3. Designing bottom-up

So much for designing top-down, which focuses on global, corporate needs. Let's now switch to the opposite perspective – bottom-up. You need to ensure that your training programmes work for everyone, irrespective of their individual knowledge, skills or capabilities.

Include everyone

The term 'diversity' is used to describe working cultures and practices that respect, welcome and harness differences – some of which are visible, for example gender, age, ethnicity and some disabilities, while others are not, for example sexuality, nationality, religion, education, class and experience. One disadvantage of using the term 'diversity' is that it reinforces differences, whereas you need to design programmes that *include* everyone, irrespective of their role, ability or outlook on life. Every organization has its own values and professional standards, and you should ensure that none deliberately, or unintentionally, discriminate unfairly against people, either inside the organization or externally.

Any training you design should enable people from different backgrounds, with different experiences and perspectives, to feel valued and be able to contribute fully in the learning experience. But recognize that the extent to which your programme is 'inclusive' will depend on a variety of factors:

- the design of the training – which you can control;
- the attitude and style of the trainer – over which you have less control;
- the pervading culture within your organization – over which you have little control.

4. Making your courses inclusive

Wheelchair access

A fundamental issue is ensuring that everyone can reach the training room, and this can sometimes be a problem for wheelchair users. It's certainly worth including this in your venue specification.

If you're planning any significant amount of desk-based work, for example IT training, it's also worth specifying that you need the purpose-built office desks which have a work surface that can be raised or lowered to provide easy wheelchair access.

Treat everyone the same

The easiest way to make a course 'inclusive' is to treat everyone the same, and not allow any prior knowledge, assumptions or prejudices you may have to affect the way you deliver your material or interact with your delegates. When selecting activities or tasks for your course you need to be aware that some people may not be able to play a full part, so you may wish to offer guidance to the trainer on how they can modify the task or delegate roles accordingly.

From personal experience I prefer to explain what the task involves, and then ask delegates which roles they would feel comfortable playing, rather than make the decision for them. You'll often be surprised by what people will volunteer for!

Flexibility

No matter how well the course has been designed, a trainer is often confronted with unexpected situations and they need to be flexible to adapt the course to meet the delegates' capabilities. All it takes is a bit of imagination and sensitivity.

- Many delegates arrive feeling anxious and simply need reassurance.
- A delegate on, say, a presentation skills course, delivering a presentation from a wheelchair, will require a few small changes.
- Delegates with dyslexia can be spared embarrassment by ensuring that they are not 'volunteered' as the flipchart scribe.
- For delegates with Tourette's syndrome or pronounced autism, it's helpful if their colleagues can be told what behaviours to expect.
- It's helpful to know in advance of any blind or partially sighted delegates, especially on courses that rely heavily on visual slides.

5. Using computers

Many courses will involve delegates using stand-alone computers or web-based materials. If so, you may wish to consider the following sources of advice or guidance.

What does it feel like?

For anyone with unimpaired physical ability it's difficult to imagine what barriers are presented in everyday life – we just take things for granted. If you would like to experience what it feels like for someone less able trying to access a website which hasn't been designed with accessibility in mind, why not try the demonstration from the Equality and Human Rights Commission?

To help people who find using a mouse difficult, many sites use access keys. These are essentially keyboard shortcuts on a website that give a keyboard or screen-reader user quick and easy access to all the main areas of the site. The keys operate functions, just like they did in the DOS days, long before Windows!

Visual impairment

Web designers can use a screen reader which converts the on-screen text to a voiceover to enable blind people to use web materials easily. You can also make your website talk by downloading the free 'text to speech' software called Browsealoud. Simply install it and then move your mouse over any text, link, picture or button and BrowseAloud will speak it to you. You can download this from www.browsealoud.com.

Like a demonstration? Try the basic narrator facility you probably have on your own PC. To access it click: *Start – Accessories – Accessibility – Narrator*.

The RNIB offers a wide range of booklets and general advice, including their See It Right booklet which you can access from www.rnib.org.uk – select the *Good Design* banner. The RNIB website offers lots of practical advice which can be accessed at: www.rnib.org.uk/webaccesscentre.

Dyslexia

The advice from the British Dyslexia Association stresses the need for clear and uncluttered screen design. More specifically:

- Keep the use of text on any screen to a minimum.
- Use short paragraphs, with clear headings.
- Choose font colours carefully.
- Use pale-coloured backgrounds.
- Use a sans serif font, 12 point.

For further information please contact: helpline@bdadyslexia.org.uk.

Hearing difficulties

If you're designing an e-learning course, build in captions or sub-titles which someone who has hearing difficulties can easily access. Simply use the same text as would be spoken for the voiceover, but which can be displayed on request.

Get the best from your computer

If you would like some ideas to improve accessibility, visit the Ability Net site: www.abilitynet.org.uk. The site shows how anyone who uses computers can easily learn a few simple things to customize their computer set-up.

- They explore how to overcome any problems caused by the display – from struggling to see the text to getting sore eyes through overuse.
- They also look at how you can make your keyboard and mouse suit you – reducing any discomfort and helping you to make fewer mistakes when typing.
- Finally, they look at how you can use the things built into your computer to help you read when you find reading lots of text difficult.

To use this service visit the Ability Net site, click on each of the areas of need and work through some of the exercises to find a computer set-up that suits you.

International accessibility standards

Now let's turn our attention to any web-based materials you may be designing, as there are so many opportunities to improve accessibility, so long as you're aware of them. The World Wide Web Consortium's [W3C] commitment to lead the web to its full potential includes promoting a high degree of accessibility for people with disabilities. The Web Accessibility Initiative [WAI], part of the W3C, in coordination with organizations around the world, is pursuing web accessibility through five primary areas of work:

- technology;
- guidelines;
- tools;
- education and outreach;
- research and development.

The current version of the WAI Web Content Accessibility Guidelines [WCAG] can be found at www.w3.org/TR/WAI-WEBCONTENT.

The Equality and Human Rights Commission

The Equality and Human Rights Commission acts as a good contact point for all issues relating to accessibility and diversity. You can find all the contact points from their website: www.equalityhumanrights.com.

6. The employer's 'two tick' commitment

Many employers have signed up for the 'two tick' symbol system which gives disabled people specific commitments regarding employment. It's worth bearing these in mind as you design your courses, so that you can incorporate them wherever appropriate.

Commitment 1

To interview all disabled applicants who meet the minimum criteria for a job vacancy and consider them on their abilities.

This commitment encourages disabled people to apply for jobs by offering an assurance that, should they meet the minimum criteria, they will be given the opportunity to demonstrate their abilities at interview stage.

Commitment 2

To ensure that there is a mechanism in place for disabled employees to discuss at any time, but at least once a year, what they can do to make sure that they can develop and use their abilities.

This commitment ensures that disabled employees are getting the same opportunities as others to develop and progress within their job.

Commitment 3

To make every effort, when employees become disabled, to make sure that they stay in employment.

This commitment ensures that employees know that, should they become disabled, they will have your support to enable them to continue in their current job or an alternative one. Retaining an employee who has become disabled means keeping their valuable skills and experience and saves on the cost of recruiting a replacement.

Commitment 4

To ensure that all employees develop the appropriate level of disability awareness needed to make your commitments work.

This commitment makes staff aware of disability issues in order to improve the working environment.

Commitment 5

To review annually the five commitments and what has been achieved, to plan ways to improve them and let employees and Jobcentre Plus know about progress and future plans.

This commitment ensures that the employer monitors their practices and achievements in meeting their symbol commitments, and identifies areas for further progress or good practice to share with others. The commitment also helps managers to plan how to let people know initially that the company has become a symbol user, and to keep them up to date with developments.

7. Be positive about accessibility

The main point is to be positive about accessibility as you progress through your training design project. And it starts right at the beginning when it's much easier, and less expensive, to build these features in. So remember to put accessibility positively on the agenda for every step of the journey.

Please take a few minutes to review the relevance of 'accessibility' to the course or programme you're designing. You may wish to enter the key points in Template D, Task D3.

Template D: **Define the learning needs.**
Task D3: **Designing bottom-up.**
Duration: **30 minutes.**

3

The training design project

1. Step D of the DESIGN model

The purpose of this step is to:

- define, in consultation with the sponsor, the human performance requirements in terms of learning needs;
- identify constraints, localization issues and budget limits;
- conduct a comprehensive learning needs analysis.

Inputs

The inputs to this step in the process might include:

- allocated learning design professional or design team;
- design request summary information;
- feedback from clients, customers, suppliers or other people;
- documented business need, for example a new product launch.

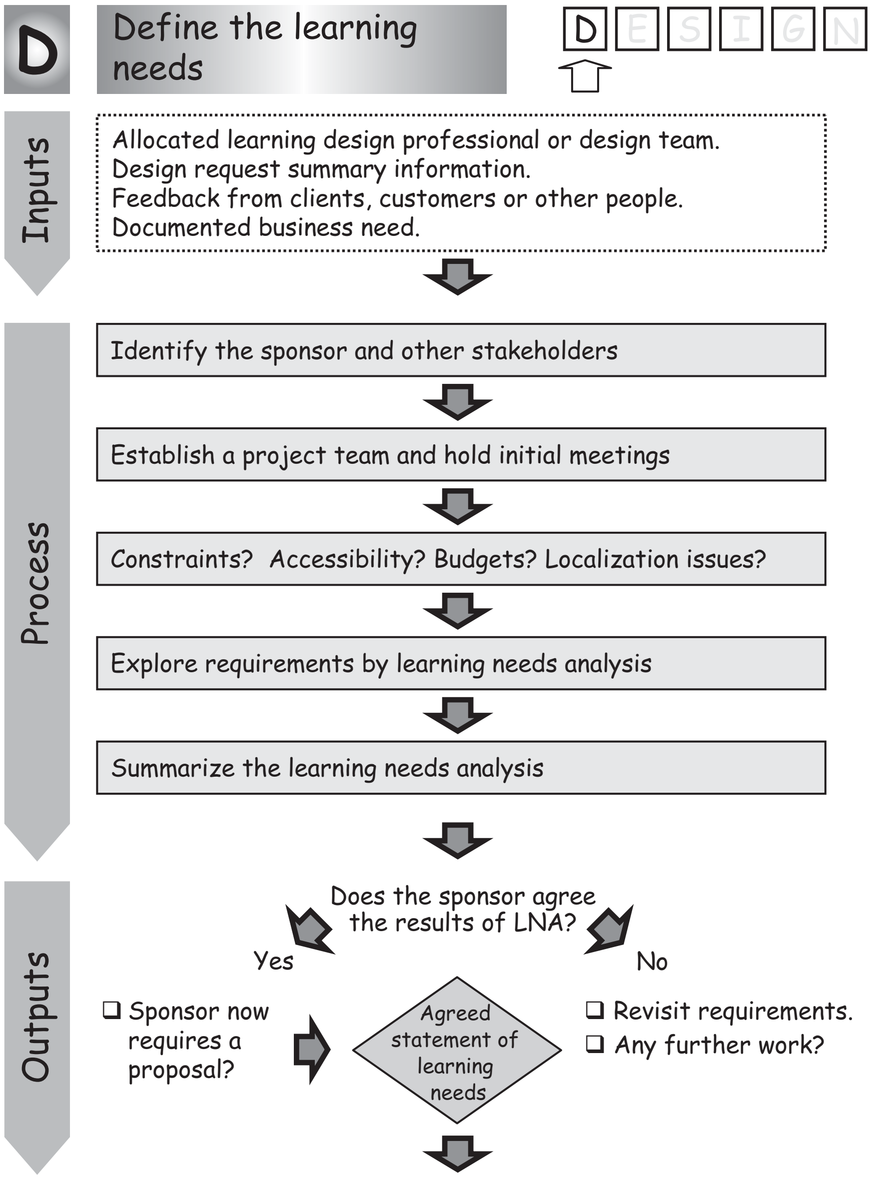


Figure 3.1 Define the learning needs

Actions

The actions you might expect to take include:

- Identify the sponsor, and other stakeholders.
- Establish a project team and hold initial meetings.
- Discuss any constraints you might identify, including budgets.
- Are there any 'localization' issues – for example:
  - What languages would be required?
  - Are there any 'cultural' issues which need to be reflected in the course-ware?
- Explore requirements – carry out learning needs analysis.
- Summarize what you find.

Outputs

The outputs from this step will include:

- agreed statement of the learning needs.

2. Identify your stakeholders

So you've been asked to design a course – where do you start? It's tempting to get stuck into the detailed design of the course, but there are more important aspects to get to grips with. First of all, you need to establish your training design team. Start by identifying all the key people who have an interest in the project – in current jargon, the 'stakeholders'. This sounds so obvious but, if you don't involve all the right people, you can end up wasting days of effort. Not to mention damaged reputations! Here's a cautionary tale.

I once worked in a freelance capacity for a team of independent consultants who had designed and delivered an intensive quality initiative programme for one of the UK's leading fast-moving consumer goods (FMCG) companies. Following the success of this programme the company's quality director (QD) asked the consultants to design and deliver some follow-on workshops, which would train the company's managers to take responsibility for the quality initiative.

I and the consulting company spent several days designing the initiative and practising the presentation, which was to be made to the managing director (MD) and the quality director. On the due day we arrived, loaded down with overhead projector (OHP) slides and handouts and, after the usual preliminaries, started our presentation.

Within a few minutes the MD stopped the presentation, saying: 'I never expected an extension of the Quality Initiative – what I wanted was a Management Development programme.'

'No,' countered the quality director, 'when we spoke the other week you said you wanted to see Quality Improvement teams established in the company.'

So the whole thing ended in chaos. Clearly the MD and QD had failed to agree between them what they really wanted but, more fundamentally, the representative from the consulting firm had failed to identify and resolve this rift between the two key stakeholders.

We walked away from this valuable learning experience with our self-esteem and professional image damaged, and have never repeated the same mistake. The lesson is clear – before you start any design work you must identify the key people who will have an impact on your project and whom you need to involve from the very beginning. Your list will probably include some or all of the following.

A project 'champion' or sponsor

A champion or sponsor needs to be someone well known in the company who is able to influence a wide range of key people, especially operational and financial 'movers and shakers'. The sponsor will promote your project and, if things get tough, argue why it should not be abandoned in favour of other projects.

Your sponsor will probably have an operational interest in the successful outcome of the training initiative, perhaps contributing towards the success of corporate objectives with which they are personally associated.

Budget-holder

You will need to gain [and keep] the active support of the budget-holder to ensure that progress is not held up by irritating budgetary approvals or delays.

Topic 'owner'

Each topic in the training portfolio will have someone who is recognized as its 'owner' and who has the power to 'sign off' changes to the strategy or the content of any materials related to it.

Subject matter experts

Depending on the topic, you may need input from acknowledged experts in the field to provide up-to-the-minute advice or guidance on the way the topic is being implemented, or how it may change in the light of future technological developments or legislative changes. This may be you or, depending on the topic, someone in an operational department.

You also have another issue to consider – do you employ internal or external people?

Internal people:

- They will have extensive knowledge of current initiatives, be soaked in the culture and need no introduction to current processes or procedures.
- They will be less expensive than external subject matter experts or designers, but may not have so much flexibility in terms of availability.

External people:

- They bring a fresh approach and are able to share best practice from other companies, unencumbered by all the internal politics or 'baggage'.
- The downsides are that they will need to spend time familiarizing themselves with your internal procedures or initiatives and, of course, they generally cost more than internal people.

So the choice may simply come down to costs, time or just availability to enable a project to be completed in a given timescale.

Line managers

You also need to gain the commitment of the managers who will be affected by the training, and then keep them actively involved throughout the whole development life-cycle. Listen to what they say and build their ideas into the programme as it develops.

Trade union representatives

If you have significant trade union representation in your organization, you will be well advised to involve them at an early stage. The resulting training will almost certainly involve their members, and gaining active support from the trade union early on will be very helpful.

Members of staff

Include a number of staff from a representative ‘slice’ of the organization – different grades, departments, disciplines etc.

Who are your stakeholders?

Please take a few minutes to identify who your key stakeholders are, and whom you might wish to involve in the project team. Once you have clarified your ideas you may wish to record the key points in Task D4 in Template D.

Template D: **Define the learning needs.**
Task D4: **Project team membership.**
Duration: **15 minutes.**

3. Project dashboard

Now that you’ve identified your stakeholders it can be useful to clarify in your own mind the status and influence that each of them has. A useful technique to help at this stage is the project dashboard. You will need to prepare a blank dashboard for each of your stakeholders so that you can enter the key information for each person individually. This is what it looks like:

The dashboard enables you to record:

- their name;
- the amount of influence they can exert, classified under:
  – high
  – moderate
  – low;
- the role they will probably have in the project, using the mnemonic CUTIE:
  – **C**hampion
  – **U**ser
  – **T**echnical
  – **I**nhibitor
  – **E**conomic;

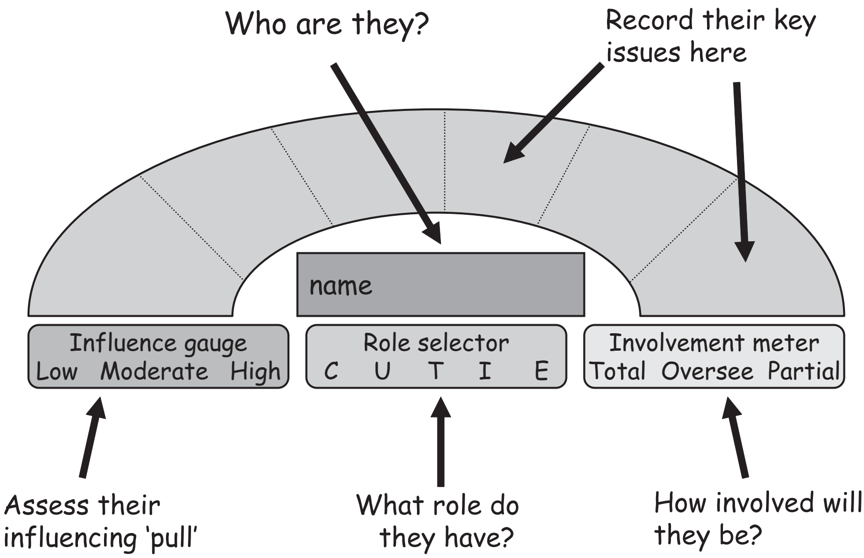


Figure 3.2 Project dashboard

- their involvement meter, using three categories:
  - total
  - oversee
  - partial;
- issues or concerns they may have.

Develop your project dashboards

It's worth taking time to assess your project team, whether or not you plan to use a project dashboard for each of them. So please take a few minutes to carry out this assessment, using Task D5 in Template D.

Template D: **Define the learning needs.**
Task D5: **Project dashboard.**
Duration: **30 minutes.**

As you start talking with people in the organization about the proposed course you will quickly realize that they fall into one of three broad categories:

- those who broadly support the idea;
- those who are neutral – ideally get them to support the project, or at least to stay neutral;
- those who are 'anti' the project.

Possible antagonists

For most of us the last person we would choose to speak with is anyone who is likely to object to or oppose our ideas. But speaking with them at an early stage can help you in one of two ways:

- Neutral reaction. Discussing your ideas may encourage them to adopt, at the very least, a neutral response, when they do nothing to inhibit or harm your project.
- Positive reaction. Spending time with them *may* turn their attitude around and encourage them to adopt a positive attitude towards the project, in which case you now have an ally rather than an enemy. And a very strong ally as well.

In any event, spending time with people who have different views from your own, and exploring why they think that way, can give you valuable insights or other perspectives of the way the company operates or how things get done. Let them know you're speaking to them early because their opinion is important to you. Very often we put off difficult discussions until last, by which time these individuals are aware that you've spoken to everyone else first. This can make a challenging situation worse.

4. The initial planning meeting

It's important to get the whole project off to a good start and, to ensure that there are no misunderstandings, it's essential to get all the key stakeholders together for an initial planning meeting. This ensures that all the key issues are fully discussed, and that everyone's in agreement at least once during the project life-cycle!

As you draft your agenda you may wish to include some or all of the following items:

A. Confirm the membership of the training design team.
B. Discuss roles, responsibilities and accountability.
C. Discuss how the learning needs will be assessed.

D. Discover any limitations.
E. Establish links to other business initiatives or products.
F. Discuss company standards.
G. Diversity and accessibility issues.
H. Set realistic deadlines.
I. Agree the review process and set key dates.
J. Agree budgets, funding and resources.
K. Agree the 'signing off' process.

Let's briefly explore each one in turn.

A. Confirm the membership of the training design team

You may find that this takes more time than you expect. You want people on the project team who are really prepared to give their full commitment, not just an occasional passing visit. Think back to the ratings you've given people on the project dashboard and be prepared to really challenge someone's commitment and interest.

How many people should you have on your training design team? Ideally aim for between six and ten people in total.

Fewer than six people:

- will make for snappy meetings, but will place extra demands on the creativity of those present;
- may mean that there is limited 'ownership' of the resulting programme across the business.

More than ten people:

- enables you to draw on a wide range of experience and knowledge across the business.
- may make it difficult to schedule meetings, and they may last longer than you would wish.

B. Discuss roles, responsibilities and accountability

Once you've agreed who's going to contribute, it's important to discuss and agree these three interrelated aspects:

- What roles do people expect to play? Do they see themselves as sources of knowledge or expertise to be consulted on critical points?
- What specific responsibilities are they prepared to accept?

- Who is accountable for the overall success of the venture, and how is that cascaded down to you?

Clarifying these issues early on will avoid much heartache later in the design cycle!

C. Discuss how the learning needs will be assessed

First of all, why have we called this section 'learning needs' and not by the more familiar name 'training needs'? The reason is simple – what we have to discover first is what people need to learn. Once we know that, we can decide the most appropriate way for them to learn, and training is but one of the available options.

At this early stage you may not have a clear idea of how and where the learning needs will be assessed, let alone who will do it. But it's useful to have some discussion around the overall methodology that could be adopted, and gain some commitment on time and resources. However the learning needs analysis is to be done, there will inevitably be some disruption to work and that needs to be agreed at the highest levels:

- Who will do the learning needs analysis?
- On what sites, locations or shifts will it be carried out?
- Are there any other sources we can call upon?
- How will the results be processed and analysed?
- What's the timescale?

Learning needs analysis is a complete topic by itself – please see the next chapters.

D. Discover any limitations

Before you start any serious design work you need to know if any decisions have been taken that place any restrictions on what your final training solution might look like. I know this sounds a bit like 'putting the cart before the horse' but you need to know if there are any constraints you must work within before you start designing.

For example, having completed an exhaustive learning needs analysis, you might, for example, design a two-day training course only to be told:

- 'Sorry about this. We'd decided right at the start that the longest the staff could be away from their desks is half a day.'
- Or: 'At the last board meeting it was decided to cascade these key global training messages using DVD.'

- Or: 'Oh, didn't you hear? It was agreed that this topic was ideal for e-learning, so can you design it in that format?'

Whatever the cause, you will then have to go away and redesign the training programme and materials – it's a waste of your time, so why not ask before you start?

E. Establish links to other business initiatives or products

And now we come to a very important issue. Depending on the topic, there will be a varying amount of company-specific information, processes, standards or policies which must be included, and you need to find and use them. For example, if you're designing a course on selling your company's products:

- You must use exactly the same materials used elsewhere in the sales process.
- Contracts, specifications, conditions, prices, terminology, brand images etc will all be defined by the relevant marketing or procurement teams and you must use them all.

However, if you're designing a course on, for example, performance management, the situation will be more fluid:

- There will be many standard procedures and policies which are implemented across the company, and which will have to be incorporated into the course. An example might be the company disciplinary procedure.
- There will also be many other aspects of performance management which are more generic, for example soft skills, and which can be imported as best practice from outside the company. Examples could be asking open questions and helping an individual to boost their self-esteem.

If you're designing a presentation skills course then the situation is likely to be different again:

- Apart from some general advice about using standard PowerPoint templates, there will probably be little mandatory material to be incorporated.

You will need to have access to all these materials, ideally in electronic format so that they can be used in the course design with the minimum amount of effort. In many companies these materials exist in the company intranet so they are readily accessed electronically.

One further aspect whilst we're on this section is to clarify any content that *must* be included in your training package. Perhaps there has been a directive about some important issue, or there may have been some recent legislation which places onerous responsibilities on employers which has to be stressed to all employees.

- For example, one can't imagine a recruitment and selection course that doesn't include a section on diversity.

F. Discuss company standards

Another different, but linked, issue is the need to ensure that the materials you develop in your course are consistent with other company materials. For example, links to existing initiatives, buzz words, images, logos or templates.

So if you were developing a recruitment and selection course you would need to ensure that all the terms and content related to 'job descriptions' or the 'short-listing process' were consistent with the words and concepts used anywhere those concepts were discussed.

This may take some persistence as you will need to contact a wide range of people in the company to see if anything they have, or are responsible for, may impinge, however slightly, on the topic you are developing. Again it is time well spent – better to change something now than when many hours of development have been committed.

G. Diversity and accessibility issues

Consider what diversity or accessibility issues might arise, either with any web-based materials or with trainer-led courses. If you're not sure then ask around the business to see what other people might suggest.

H. Set realistic deadlines

We all realize the importance of setting deadlines but they're not always *realistic*. Don't be pressurized into agreeing deadlines when, even as you're saying them, there's a little voice inside your head saying: 'You'll never meet that!' Of course, if you're designing a training programme linked to another initiative, such as the launch of a new company product or service which has a high-profile 'go live' date, then you may not have too much choice. But the pressure to meet the publicized date may free up some extra resources which you might otherwise not have.

Inevitably your design process will take longer than expected:

- People won't always be available when scheduled.
- Designing courses or materials often takes longer than you expect.
- People change their requirements part way through the design process.
- Other departments suddenly announce changes to their part of the business, which have an impact on your course.
- Market forces may bring about changes in priorities or focus.
- Or simply that key people go on holiday.

So when you're discussing the timescales do remember to build in some additional time to allow for these unexpected demands.

I. Agree the review process and set key dates

Another important element is to discuss and agree how progress will be reviewed, and how any necessary corrective action will be scheduled and monitored. Look ahead and set the key dates by which the various elements of the programme need to be in place. Getting these dates into people's diaries early is the only way you can be sure they'll be available at the critical moments. And if the meetings aren't needed they can always be cancelled, magically freeing up spare time:

- Consider using project management software to keep everyone involved in the development of what will become a complex project.
- You may also wish to discuss and agree a standard review template which you can use to drive the agenda for each review meeting.

J. Agree budgets, funding and resources

Yet another vital aspect of managing your project is to secure the all-important financial support. Prior to the initial meeting, prepare an outline budget which includes all the costs you can anticipate, plus some contingency.

Things always cost more than you expect and take more time than you budget for. Also ensure that any changes that are requested as the project develops are fully documented so that you can justify any budget overruns.

You need to ensure that the budget appears on the agenda for the periodic review meetings, so that no one can accuse you of allowing costs to spiral out of control.

K. Agree the 'signing off' process

Clarify who has the authority to 'sign off' the course and the associated documents at critical stages. This again sounds easy but I have had several challenging situations, which developed because this hadn't been clarified.

On one occasion I was developing a performance management course for a client and had reached the final 'sign off' stage. At that point the manager who throughout had claimed to be the authority on the topic casually announced: 'I suppose I ought to run it past X who is the topic owner for the company's discipline and capability procedures.'

And of course the other manager, who had not been at all involved in the design process, quite reasonably declined to 'sign off' the materials, so we virtually had to start all over again. To avoid this happening to you, spend a few minutes agreeing:

- Who will 'sign off' the design.
- Provisional milestones for the various stages of design.
- How will changes actually be agreed? Will you meet to discuss them? Will you do it by e-mail? Tele-conference?
- Can you agree a process whereby, if no changes are sent within an agreed time, agreement can be assumed?

Your initial meeting agenda

Having considered what you need to discuss during the design team's initial planning meeting, please take a few minutes to draft the agenda, and enter the outline in Template D, Task D6.

Template D: **Define the learning needs.**
Task D6: **Planning meeting agenda.**
Duration: **20 minutes.**

The message is clear. To be successful you must prepare for every stage in your course design process. Don't just cruise along only to find that events collapse around you. Take heed of the well-known adage:

Proper Professional Preparation Prevents Poor Performance!

4

Formal learning needs analysis

1. The importance of learning needs analysis

Having assembled the project team you're now ready to start the design journey by tackling the next step of the DESIGN process, which is to analyse how people need to change in order for them to deliver the new required levels of performance. Then, before starting any design work, you get the recommended course of action 'signed off' by the key stakeholders.

Define the learning needs

The purpose of this chapter is to introduce you to a variety of formal methods for assessing how people need to change in order to be able to deliver the new required level of performance. In the next chapter we'll explore several approaches which teams can use, with your guidance, to do their own learning needs analysis. You should find that using a combination of these approaches will enable you to discover the real learning needs, so that you can design an appropriate package of experiences to deliver the required changes in performance in a timely, stimulating and cost-efficient manner.

Spending time early on with the key people involved in the project may save you valuable design time later. Many years ago, as a young soldier, the author was introduced to one of the Army's basic maxims – *time spent in reconnaissance is seldom wasted*. And it's true!

2. Why 'learning needs analysis'?

How do we define 'learning'?

Before we continue on our design journey we should perhaps clarify why we emphasize '*learning* needs analysis' and not '*training* needs analysis'. A pure definition of '*learning*' could be: *a process which enables someone to acquire new attitudes, skills or knowledge.*

To justify all the direct costs in providing learning opportunities, not to mention the lost revenue-earning time, a business must be able to see a direct benefit resulting from any learning that their staff experience. So, for learning taking place in a commercial or business setting, we should perhaps expand the definition of learning to be: *a process which enables someone to acquire new attitudes, skills or knowledge… so that they can do something they couldn't do before, or to do it more effectively.*

The process that enables learning to occur *could* be a training course, but also could be a secondment, or coaching by the manager, or something else. So that's why we should avoid talking about '*training* needs analysis' – it automatically suggests that the solution will be training of some sort, and this may close your eyes to other good options.

So where does 'education' fit in?

When we consider someone being able to work more effectively the four main parameters usually considered are:

- Quality – deliver new levels of quality.
- Quantity – process or handle more orders or items.
- Cost – do more for the same cost, or the same output for less cost.
- Time – take less time in basic handling, or work to earlier deadlines.

It's being able to *apply* the learning to make a difference to performance that differentiates learning in the commercial sense from pure education.

And so what is 'training'?

So now we've defined 'learning', how do we define '*training*'? Building on the definition we used earlier, we could define '*training*' as being: *a process designed to facilitate learning in the target audience.* As before, we've kept the definition as wide as possible and not limited ourselves to the strictly commercial setting.

And what's the difference between '*education*' and '*training*'? If you're the parent of teenage sons or daughters you might be pleased to hear that your offspring were to be given sex education at school… but would react quite differently if they were to be given sex training!

3. Whom will you consult?

As you plan how to conduct your needs analysis, one of the first decisions you will have to make is *whom* you will approach – whose views or opinions will you seek? There are many candidates, including:

- strategists – the 'movers and shakers';
- known 'champions' of specific initiatives;
- managers and team leaders;
- staff;
- internal specialists or experts;
- recognized industry or topic experts;
- customers or suppliers;
- government or regulatory bodies;
- professional institutions;
- trades unions;
- external consultants;
- independent specialist organizations;
- similar industries or professions.

As you develop the list of people within your company or organization whom you intend to consult, it's important to remember that you need to be sensitive to their feelings and anxieties. Many people feel threatened if someone approaches them to ask about the way they or their team currently perform their jobs:

- At the very least they may see it as an adverse comment on their skill or commitment.
- Many may fear that it heralds future unwelcome changes, or even job losses.

Also ensure that you canvass views across a fully representative population, recognizing that some people work in remote locations or at unsocial hours. It will be much easier to get 'buy in' to your proposals if everyone can feel that they have had an input to the needs analysis.

Please take a few minutes to decide whom you will consult to ensure that your learning needs analysis gives you an accurate picture of what's required. You may wish to enter their names, job titles or departments in Template D, Task D7.

Template D: **Define the learning needs.**
Task D7: **Learning needs analysis – whom to consult.**
Duration: **20 minutes.**

4. Learning needs checklist

By this stage you've decided whom you will approach but still may be a little uncertain about what you will ask them. To help you with this, we've given you a detailed checklist of topics to cover (see below) and, although you may not need to discuss every item, this should give you a starting point. It's unlikely that you will be able to run through the set of questions in the sequence we've given, as people will often talk around the subject in an unstructured way. Listen carefully and capture the information they give, using the checklist as a prompt to ensure that nothing is missed. Incidentally, the content and sequence are replicated in the chapter dealing with the training proposal, and both are available online.

There are three main sections and we'll explore each one in detail.

- Section 1 – Background to the problem/requirement
- Section 2 – Detailed exploration of the problem/requirement
- Section 3 – Delivery logistics and constraints

Section 1 – Background to the problem/requirement

What is the problem/requirement?

Your aim is to produce a clear problem or requirement statement. This helps you and the sponsor to understand the problem in simple terms eg: 'Our system users are having difficulty with many of the transactions on our new X software.' Where problems are more complex, and may have a number of contributory factors, it helps to isolate and define those likely to have learning and development solutions, and those that will require other solutions. It's useful to ask people to articulate what success would look or feel like, as this can give you ideas about how you can see or measure the impact of any learning or training interventions.

- What do people need to do that they currently cannot do or are not doing?
- What would success look like?
  - What would people be doing?
  - How would they be behaving?
  - What measures would change?

What has given rise to the requirement?

Your aim is to understand the likely cause of the problem. Is it a short-term issue requiring a 'sticking plaster' [perhaps updating workshops or courses] or a more systemic issue that requires longer-term treatment [eg a new starter skills development programme].

Specific issues to explore or discuss include:

- Operational, legislative, governance, technical, social or other 'big picture' drivers?
- Need to 'dovetail' the intervention with other initiatives within the company or industry?
- Changing market requirements?
- New systems/processes/procedures/work practices?
- Any other significant changes planned – for example, new organizational structures?
- Externally driven timescales or criteria you need to take account of?
- Changing job roles?
- New people unskilled/untrained?

What is the impact to the business?

It's important to understand the relative importance and cost to the business, for two reasons. First, it can help justify any expensive proposals you are likely to suggest using a cost–benefit approach. Second, it helps you to prioritize your efforts and secure resources from your manager.

Specific issues to explore or discuss include:

- What is the likely impact of doing nothing / what is at stake?
- What savings could be made by intervening?
- What would be the potential value of intervening?

Section 2 – Detailed exploration of the problem/requirement

Who is involved? It's important to establish as much as you can about the number, type and location of the people involved as this information will have an influence on the learning or training strategy proposed. Different groups of people may need different products more appropriate to their situation and role in the organization. Some groups may have a greater priority for the training, which may affect your roll-out plan.

If they are scattered globally then an e-learning solution may not only be cost-effective, but may be the only way of reaching everybody. Alternatively, you may need to partner with external training providers who operate in the locations. There are other issues related to the location, the most obvious being the language used. Even if English is officially spoken locally, not everyone will appreciate the subtleties of English words, phrases or expressions which can so easily change the meaning of what's being said. This is especially important in self-study products where the trainer isn't available to explain any misunderstandings.

Specific issues to explore or discuss include:

- Personnel company-wide?
- Personnel within a specific business sector?
- Personnel within a specific site / unit / department?
- Are they…
  - Managerial / supervisory?
  - Non-managerial professional / technical?
  - Operators?
  - Support staff?
- How many people in each category?

- Are they…
  - Represented by a trade union or professional institute?
  - Does the trade union or professional institute need to be involved in the design process?
- What are…
  - Their educational levels? [eg degree, non-degree, craft qualifications, other recognized vocational qualifications.]
  - The nationality/nationalities?
  - The language requirements – is translation required?
- Any major cultural sensitivities?
- Any known personality characteristics or learning styles?

What type of performance is required?

The information you collect under this heading will influence the learning or training strategy you develop. You need to understand what performance is required by the individuals and the skills, knowledge and behaviours required in order to perform them effectively. The type of skills involved will also influence the training media and methodologies chosen. Finally, understanding the persistence and decay of the skills or knowledge will help you understand the frequency needed, and to consider whether certification, testing or accreditation is required.

Specific issues to explore or discuss include:

- Manual/operative/transactional skills.
- Interpersonal or behavioural skills.
- Technical or professional skills.
- What is the difficulty level of the skills?
- What is the required level of accuracy?
- How frequently are they performed?
- Are there safety-critical issues?
- Is there a mandatory or legislative requirement?
- Will certification or accreditation be required?
- Do the skills need regular reinforcement to prevent rapid decay?
- What information is required to underpin the skills?
- What behaviour is required to underpin the skills?
- Will different groups need different approaches or products?

Section 3 – Delivery logistics and constraints

Where does the learning/training need to be delivered?

You obviously need to discover where the learning or training needs to be delivered and the preferred delivery methods, eg on site, on the job versus off-site, etc. The answers here are obviously closely linked to who is involved, where they are located and the relative costs of the options.

Specific issues to explore or discuss include:

- Worldwide?
- National/geographical region?
- At work, on site?
- At a company learning/training centre?
- At a company learning resource centre?
- External venue?
- Home?
- A mixture? If so, who, where, what and how?

When does the learning/training need to be delivered?

You need to determine the urgency of the requirement and the lead-time available before the first programme has to be delivered. This will obviously influence the design resources required and the make or buy-in decision.

Specific issues to explore or discuss include:

- What are the timescales?
- What is the lead-time to the first event?
- Does it need to be completed by a specific date?

What are the potential delivery approaches?

At this stage the aim is to understand whether there are any preferred delivery approaches or constraints that will restrict or make certain approaches unacceptable.

Specific issues to explore or discuss include:

- What approaches may be suitable and/or acceptable?
  - Common programme for all?
  - Bespoke versions for specific target groups?
  - Modular approach – mandatory core sections plus electives?
- Are there priorities for delivering learning to specific groups?
- Is a phased delivery strategy likely and/or appropriate?
- What would the phases be?
- What is the likely 'shelf life' of the product?

Preferred delivery methodologies

Discover if there are any strong preferences for/against a particular delivery strategy. Do staff have access to the company learning and development centres, or can they access learning online?

Specific issues to explore or discuss include:

- At this stage, are there any strong preferences for or against:
  - Learning on or off site?
  - E-learning?
  - Training centre based?
  - Learning at the workplace?

What funding is available?

It's important to establish early on whether the person commissioning the work has the budget to pay for the product or, if not, has access to someone who has. Clarifying how much money is available and when it could be released is vital as it may affect the choice of the learning methodology selected.

Specific issues to explore or discuss include:

- Is there a budget for the project?
- What is it?
- Who is the budget-holder[s]?
- What is the relationship with the sponsor?
- How will work be paid for?

Are there any other constraints?

Determine whether there are any other major constraints, either known or suspected, that may affect the overall project.

Specific issues to explore or discuss include:

- Do all end-users have access to the company network/intranet or the internet?
- Can concurrent training be provided across the time zones involved?

Transfer or wider application

Determine if this product might have wider application to other businesses. If it does, it might be possible to involve other prime users who will jointly sponsor the work to reduce the costs to any one business and maximize the use of the design work. Equally, a wider application may free up additional design resources and so speed up the design process.

Specific issues to explore or discuss include:

- Could the product have relevance outside the target groups?
- Could it be used elsewhere in the business?
- Are there other business units with similar developmental issues?

So now we return to the question we asked at the beginning of this section – what information will you collect? Please take some time to collect your ideas before we move on.

Template D: Define the learning needs.
Task D8: Learning needs analysis – data to collect.
Duration: 45 minutes.

5. Data collection techniques

Now that you have a good idea of the information you need to collect you can consider how you will gather it. There are many ways to discover learning needs, some formal but many informal… and sometimes from unexpected sources. Let's illustrate this with a story.

Several years ago I was travelling by air from London to Paris. I arrived, as required by the airline, at 5.30 am – two hours before the scheduled departure time of 7.30, and joined the other passengers at the departure gate. The passengers waited patiently, watching the clock creep round towards the expected boarding time. Seven o'clock came and passed and the passengers started to get restless. Finally, at about 7.30 a member of staff abruptly announced that: '*We've just been told that your flight has been delayed for 4 hours.*' No reason was given, no apology was given and no alternatives were offered.

Immediately the previously quiet and orderly 100-odd passengers erupted into a noisy and unruly mob. The information desk was surrounded by passengers demanding explanations and transfers to other airlines. The staff gave out no more information and refused to organize transfers to other airlines. Absolute chaos resulted and the staff had to placate scores of angry passengers, with all the resulting stress for everyone involved. I decided against joining in the fray and quietly stood back and let events unfold. Within an hour I learnt from another, more helpful member of staff, that all flights from London had been delayed because of fog covering Paris.

Back in the departure lounge just before 10 am I had a quiet word with the member of staff who made the original unhelpful announcement and discussed her approach. After some gentle questioning I got her to realize that if she had told people that the cause of the delay was fog, which would obviously affect every airline, her morning would have been a lot less stressful. Realizing that the delay was outside the airline's control, people would have reacted in a much more reasonable way. I hope she came out of that morning having learned a valuable lesson!

So 'observation' can be a very helpful way to discover learning needs – what other sources or methods can you call upon to discover them? You might wish to consider some of the following:

- interviews;
- questionnaires;
- focus groups;
- observation;
- feedback;
- customer complaints;
- fault reports;
- work samples;
- accident investigation;
- testing;
- skills audits;
- annual appraisals and performance reviews.

These sources can be grouped into two main sub-groups – verbal or written, with varying degrees of interaction. Let's explore the advantages and disadvantages of the primary methods, leaving you to decide which will work best for you.

Verbal interactive methods

Overall – greater depth, detail and focus, but can lose accuracy and objectivity.

Interviews

- Structured interviews – consistency.
- Informal interviews – depth.
- Larger samples – accuracy.
- Face-to-face interviews – detail and candidness.

Advantages of interviews:

- Good for uncovering feelings and hidden causes.
- Non-verbal signals can indicate key issues.
- Spontaneity – follow the unexpected issue.

Disadvantages of interviews:

- Time consuming.
- Unrepresentative sample can skew the results.
- Can be difficult to quantify.
- Very dependent on the skills of the interviewer.

Focus groups

- A facilitated discussion with a representative group.
- Brings the group dynamics into the analysis process.

Advantages of focus groups:

- Allows people to build on the ideas of others.
- Less repetition than individual interviews.
- Better use of time.
- Use the group to focus the training design effort.
- Develops group 'ownership' of the resulting programme.

Disadvantages of focus groups:

- Unskilled facilitator can allow the situation to go 'critical'.
- May be difficult to schedule.
- Quantifying the results may be difficult.

Written interactive methods

Overall – moderate depth of detail and easier to quantify. Moderate accuracy, objectivity and spontaneity.

Testing

- Structured analysis of skills and knowledge.
- Effectively follows broad needs analysis process.
- Presence of trainer may increase validity.

Advantages of testing:

- Good for uncovering specific skill deficiencies.
- Results easily quantified.
- Good for testing 'right' or 'wrong' solutions.

Disadvantages of testing:

- Limited availability of tailored, pre-validated tests.
- Testing may inhibit normal performance.
- Testing may build resistance to training.
- Inappropriate where there is no 'right' answer.

Questionnaires

- Larger samples – greater accuracy.
- More random the sample – more valid the results.
- Blends a variety of question formats.
- Give the option to remain anonymous.

Advantages of questionnaires:

- Option of anonymity may increase the accuracy.
- Portions of data easily quantifiable.

- Cost-effective – more people reached with less effort.
- Sample many people at the same time.

Disadvantages of questionnaires:

- Little opportunity for spontaneous clarification.
- Developing a valid questionnaire takes a lot of time.
- Low response rates.
- Inability to probe for root causes.

Semi-interactive methods

Overall – greater accuracy and objectivity. Moderate spontaneity, depth and relevance.

Observation

- Wide range of applications: time and motion studies or watching specific behaviours.
- Flexible approach – can involve one to many in the process.

Advantages of observation:

- Observer awareness does not alter performance.
- Resulting training should be highly relevant to the operational setting.

Disadvantages of observation:

- Observers must be well trained.
- They need the right skills, and awareness of what to look for.
- People may change their performance while being observed.

Work samples

Examples include:

- letters / proposals;
- product samples;
- job descriptions;
- design sketches;
- financial projections;
- project plans.

Advantages of work samples:

- Highly effective way to assess results currently produced.
- Easily obtained with little interruption to current work.

Disadvantages of work samples:

- Less able to reveal potential skills.
- Often requires skilled analysis.
- Limited to internal factors.

Documents

Examples include:

- summaries of appraisals and performance reviews;
- third-party feedback and complaints;
- fault reports;
- training manuals;
- policy handbooks;
- budgets;
- employee records;
- management reports.

Advantages of documents:

- Easily obtained with minimal disruption.
- Extremely objective way to collect data.

Disadvantages of documents:

- Data may not be current.
- Skilled analysis may be needed.
- Less able to uncover root problems.

Deciding which approaches to use

As you can see, there is a wide range of formal approaches open to you, and your choice will depend on the operational constraints within which you have to work. If possible, opt for a blend of several methods, as this may help you to get more representative results, rather than relying on one method.

6. Practical examples

Using questionnaires

You may be interested to see this sample questionnaire, which was designed to gather information about learning needs associated with speed reading:

Types of Question	Speed reading questionnaire	Types of Information
	We are assessing the need for a course on speed reading and we would appreciate your responses to the following questions. It's purely voluntary and shouldn't take you more than a few minutes. Please be assured that your answers are confidential.	
Open	1. Please briefly describe your role.	
Rating	2. Please rate your level of need for speedy reading and comprehension with the following types of material: Reports/proposals [no need] 1 2 3 4 5 [strong need] Non-fiction books [no need] 1 2 3 4 5 [strong need] Fiction books [no need] 1 2 3 4 5 [strong need] Newspapers [no need] 1 2 3 4 5 [strong need] Technical manuals/documents [no need] 1 2 3 4 5 [strong need] Letters/promotional material [no need] 1 2 3 4 5 [strong need] Magazines/professional journals [no need] 1 2 3 4 5 [strong need]	
Ranking	3. Please rank the following skills in order of importance to you – '1' being the most important and '5' least important. ___ Remembering reading material more effectively. ___ Taking brief and effective notes of written material. ___ Deepening comprehension and understanding of written material. ___ Increasing reading speed. ___ Summarizing and applying written materials.	
Open	4. Have you ever studied 'speed reading' before? If 'Yes' please briefly describe what you did and the results you achieved.	
Clarifying	5. Please tick any of these concepts you're familiar with. __ Area reading __ Multiple reading process __ Recall patterns __ Previewing reading material __ Reading hand motions __ Subvocalization	
Open	6. Please describe one or two specific methods you currently use to manage your reading load.	
Open	7. Under which circumstances and with what types of material do you find it most difficult to read quickly and effectively?	
Forced choice	8. How do you learn most effectively? Please select only one. __ Studying underlying concepts __ Step-by-step instruction __ Observing others __ Just getting 'stuck in'	

Figure 4.1 Sample questionnaire

- Alongside the text on the left we've shown the types of questions being used.
- Please record in the boxes to the right of the text which types of information you think each question is designed to target.

Learning needs analysis in action

One interesting assignment I undertook was to assess the learning needs of a group of staff who would be operating a new production line in a food factory. The production line would comprise a series of different machines from varied suppliers, and would process raw materials into sealed sachets, which would then be packed into cartons, which would then be loaded onto pallets before despatch to customers.

So we got together a representative group of the operators, together with the design engineers. We posted the machine diagrams around the walls in the sequence they would operate in the new production line. Then we started at the beginning of the production line and worked through to the end. All I did was to ask questions:

- 'Where will that come from?'
- 'Who will do it?'
- 'Where will it go next?'
- 'What control will you have over… ?'
- 'How will you monitor the quality?'

As the questions were answered we wrote the responses on Post-it Notes which we stuck on the appropriate part of the engineering diagram. By the end of 3 hours we had achieved quite a lot. We had a very clear idea of the role of the different operators at each stage of the manufacturing process, which we later turned into a formal training plan.

More specifically we knew:

- how many operators would be required;
- what specific actions the operators would have to take at each stage of the manufacturing process;
- how the quality of the product would be maintained;
- how the operators would monitor stocks of the various ingredients and materials, and when to order more;
- which faults the operators could clear themselves, and which they would have to call the engineers for.

As a bonus we had also identified two major engineering conflicts in the production line, because it was the first time that anyone had sat down and 'walked' through the process from start to end. If we hadn't identified them the production line would have stopped within the first 30 minutes of operation on Day One, with all the resulting chaos while the problem was sorted out under intense pressure.

7. Now focus on your course

Having considered this topic from a theoretical aspect we'd now suggest that you consider the course you're designing and decide how you'll carry out learning needs analysis yourself. Please take a few moments to make a preliminary selection of the approaches you think might work for you, and enter them in Template D, Task D9.

Template D: **Define the learning needs.**
Task D9: **Learning needs analysis – data collection techniques.**
Duration: **45 minutes.**

In the next chapter we'll explore some alternative approaches you can use for discovering learning needs – the extra bonus for these methods is that they can be used by a team themselves, leaving you free to adopt an advisory role.

5

Team-based needs analysis

1. Introduction

In the previous chapter we looked at a variety of more formal methods for assessing learning needs, which involve you in collecting and analysing the data. But there may be times when this approach isn't appropriate:

- The team involved may be small and simply doesn't warrant a formal learning needs analysis.
- Your high workload may limit the number of projects you can personally get involved in.
- The team involved has a strong identity and may reject anything not generated internally. You know – *Not invented here!*

If any of these conditions apply, why not try one of the following 'Do It Yourself' approaches? The first group is competency based, while the final approach uses work process analysis.

2. Functional competences

Let's assume you've been asked to assess the learning needs for a specific team or shift. Get them together and set the scene by explaining that you wish to ask their ideas on the learning needs of the team before starting to develop a training plan. If you have more than, say, 10 people you may wish to break them into two groups.

There are four simple steps to follow.

Step One – List the tasks or activities.
Step Two – Define standards of performance.
Step Three – List the team members.
Step Four – Assess each team member's performance.

Step One – List the tasks or activities

The team should start by listing all the main tasks or activities they need to be able to do to perform their jobs effectively. The tasks should be broken down into small enough 'chunks' to be meaningful, and listed vertically on flipchart sheets. To show how it works in practice, let's consider the results developed by a team working in a financial services company. An extract from their list of tasks was as follows:

Task						
Processing customers' orders						
Planning production						
Client detail changes						
Policy reviews						
Fund variation reviews						
Task X						
Task Y						

Figure 5.1 List the team's tasks

Step Two – Define standards of performance

The next step is to agree standards of performance which can be applied across all the tasks or activities and, in this case, the team defined the following six levels of performance:

Level 1 Has to refer a task or query to someone else.

Level 2 Can process 25% of the task being scored, to a quality standard of 95% right first time, without referral.

Level 3 Can process 50% of the task being scored, to a quality standard of 95% right first time, without referral.

Level 4 Can process 80% of the task being scored, to a quality standard of 95% right first time, without referral.

Level 5 Can process 80% of the task being scored, to a quality standard of 95% right first time, without referral. Capable of planning and delivering training to others in these tasks.

Level 6 Can process 80% of the task being scored, to a quality standard of 95% right first time, without referral. Capable of planning and delivering training to others in these tasks. Competent to perform quality checks on team members.

Step Three – List the team members

This is the easy bit – simply add the names of all the team members across the top of the matrix.

Step Four – Assess each team member's performance

The team assesses the competence of each person on every task, using the agreed performance criteria. This may take some time because it's essential that everyone agrees with the resulting rating system – but it's time well spent. The resulting matrix quickly reveals where the team has sufficient coverage on the key tasks, and also shows in which areas they are vulnerable. A training programme can then be developed to plug the critical gaps. The final matrix looks like Figure 5.2.

Publicly displayed, it enables everyone to see at a glance whom they should approach for advice or guidance, and it quickly shows the team's progress towards a better skills coverage. This general concept has been found to be very useful in a wide variety of industries and skill areas. Clearly the wording and actual task definitions are modified for each

Task	Raj	Carol	Harry	Julie	Simone	Jill
Processing customers' orders	4	2	4	6	3	4
Planning production	5	3	5	6	4	5
Client detail changes	4	2	4	5	3	5
Policy reviews	4	1	4	5	4	5
Fund variation reviews	6	3	4	4	3	5
Task X						
Task Y						

Figure 5.2 The completed task analysis

work area, for example machine operation, forklift truck driving, processing customer orders, building maintenance etc.

3. Core competences

The list of tasks the team developed above are, in effect, the functional competences required for each role within the team but, in addition, there are a number of generic competences, which can apply to all jobs. It's quite likely that the team members will need to improve these generic competences as well as the purely functional ones, so you may wish to consider the following approach. It's based on a list of 16 typical core competences. The full list is:

1. Customer focus
2. Breadth of vision
3. Judgement
4. Influencing
5. Company networking
6. Achieving results
7. Communication
8. Developing people

9. Team building
10. Empowerment
11. Managing performance
12. Safety management
13. Commercial success
14. Managing finances
15. Project management
16. Managing change

Your own organization may already have its own list of competences – if so, it would be wise to use them. Although they may change from time to time, the broad basket of competences will remain fairly constant. If you don't have a company competency model then you may find this one helpful. Just like the functional competences, each of these generic competences can be described in six levels, to enable performance to be precisely assessed.

For example, the 'customer focus' competence could be classified as follows:

Level 1 I understand that everyone has customers.

Level 2 I know who my main customers are, and the standard of service required.

Level 3 I assess and react quickly to customer needs, delivering to time, specification and cost.

Level 4 I ensure that the team retains a clear focus on customer service.

Level 5 I improve the existing level of service, prioritizing needs and keeping customer focus.

Level 6 I anticipate major changes in customer needs, and drive the business to meet them.

As before, the levels described are cumulative, so that someone who is assessed at, say, level 4 is also displaying all the attributes of levels 1 to 3.

How could a team use this approach? Basically they could adopt the same four steps as before, except that most of the work is already done!

Step One – List the competences; use either the company list or the one given here.

Step Two – Confirm standards of performance: are they happy with the six levels of definitions?

Step Three – List the team members as before.

Step Four – Assess each team member's performance.

The competences don't feature equally in every job – some may not feature very highly, while others will feature a lot. Also, in general, the higher the level of a job within an organization, the higher will be the required competence level. To enable people to focus on the essential competences it isn't necessary to rate all 16, but just those which are deemed to be vital for the specific job.

Practical example

Let's see how it works in practice using a typical job – an administrator at a visitors' centre, who also conducts occasional tours around the site for visitors. The manager for this post might have decided that the following core competences were essential, and that the job-holder would be required to display the performance levels shown (Figure 5.3).

Over a period of time the manager would discuss performance with the individual and, based on a mixture of observation, performance measures and third-party feedback, they might conclude that the actual levels of performance being displayed were as follows. We can see that, while the individual is performing on or above the required level for competences 1, 3, 6 and 7, competences 2, 4 and 5 require some development. It's a simple step to formulate a personal development plan to address these learning needs (Figure 5.4).

Competence	Desired level	Current level	Action plan
1. Customer focus	3		
2. Influencing	3		
3. Company networking	3		
4. Communication	4		
5. Team building	3		
6. Safety management	4		
7. Commercial success	2		

Figure 5.3 Core competence part 1

Competence	Desired level	Current level	Action plan
1. Customer focus	3	4	
2. Influencing	3	2	Attend next training course.
3. Company networking	3	4	
4. Communication	4	3	Report writing weak – to receive coaching for 1 month
5. Team building	3	2	Can sometimes be a 'loner' – needs to build relationships
6. Safety management	4	4	
7. Commercial success	2	2	

Figure 5.4 Core competence part 2

By adding the selected generic competences to the list of functional competences the team can quickly identify their learning needs for the whole team, and have it displayed in a visual and easily understood format.

Can you identify any situations where you might use either of these competence-based approaches for helping a team to identify its learning needs?

Template D: **Define the learning needs.**
Task D10: **Competency-based learning needs analysis.**
Duration: **45 minutes.**

4. Work process analysis

This next approach helps a team to identify its learning needs in an innovative way, by looking at their work processes and deciding which are critical for business success. The method goes direct to the core of learning needs analysis by focusing on what's required to improve business performance. It involves three main phases:

Phase 1 – Identify all the team's work processes.

Phase 2 – Identify the key work processes.

Phase 3 – Focus on the learning needs.

To show how it works, we have used a freelance trainer's role for the inputs, outputs and work processes. When you come to explain it yourself you'll no doubt use jobs and terms with which the team is familiar, before embarking on the actual process with them. Use the following template for the first part of the process to record inputs, work processes and outputs (Figure 5.5).

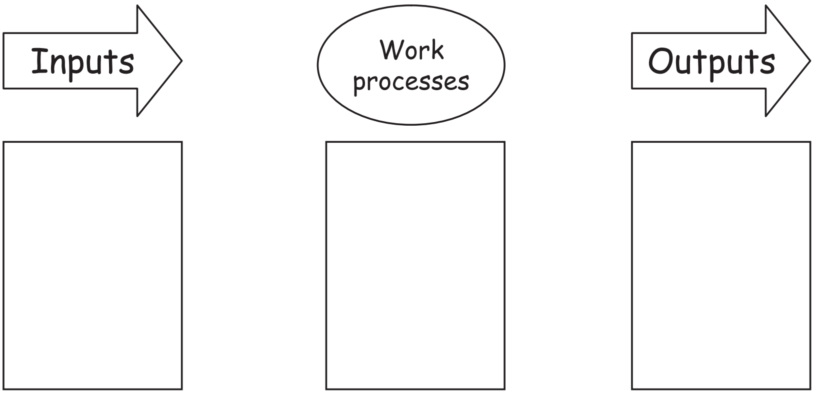


Figure 5.5 Key work processes

List your inputs

Start by focusing on the left-hand column headed Inputs. Ask the team to list everything that prompts them to do their work. It's important that they use nouns like 'Telephone calls' or 'Meetings' and not verbs! Using our example of the freelance trainer, the template could look like this (Figure 5.6).

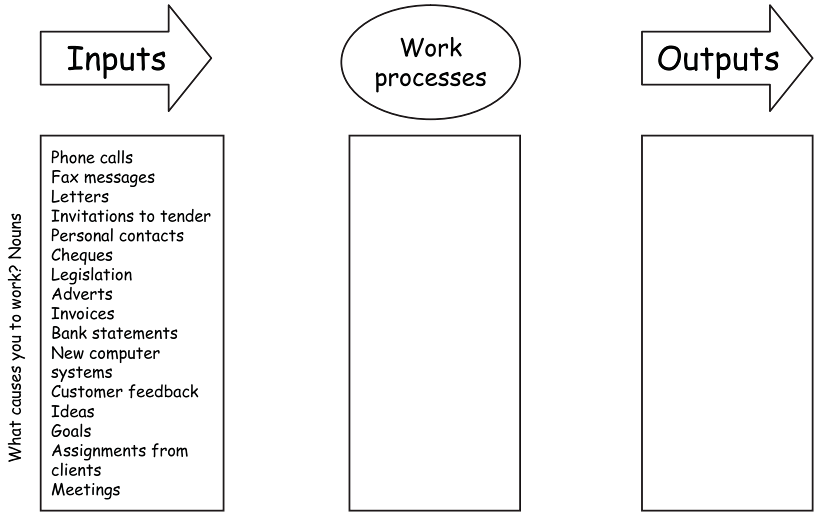


Figure 5.6 Identify the inputs

List your outputs

Now focus attention on the right-hand column headed Outputs. Ask your team to identify what they produce, using nouns again – words like 'Satisfied clients' or 'Motivated people' and not verbs! Using our example of the trainer the template now looks like this:

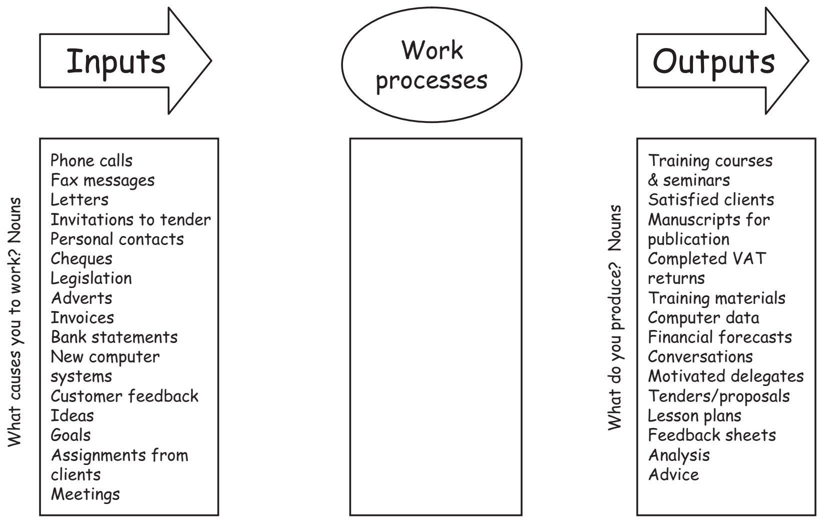


Figure 5.7 Identify outputs

List the key work processes

Next identify the work processes, which are recorded in the central column. The team should ask themselves 'What do we do to turn inputs into outputs?' This time they should use action verbs like 'Planning' or 'Consulting'.

You're not trying to link specific inputs and outputs with work processes – just to identify a full list of all the work processes involved. In our example the trainer might use the following work processes:

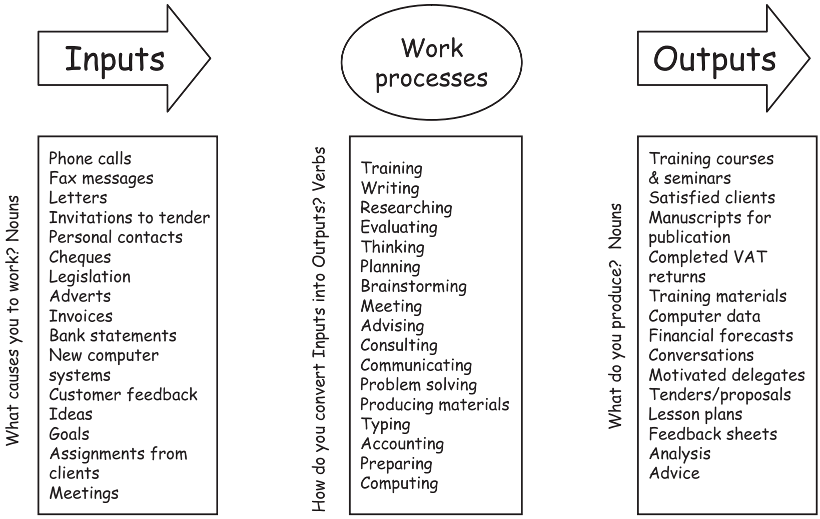


Figure 5.8 Identify work processes

Review what you've done

At this stage, ask everyone to reflect on the information they've recorded in the three columns. Although the main focus will be on the work processes, it's worth examining the other two elements to see if there are any opportunities for improvement.

Start with the inputs and outputs:

- What are their relationships like? Could they be improved?
- Do they have service level agreements, or their equivalent, for them all?
- Which causes most hassle on a day-to-day basis?
- How do they measure customer or supplier performance?

- Could their customers or suppliers modify the inputs they supply to reduce processing work?

Now focus on the work processes they've identified, the action verbs listed in the centre column, as this is where they will start to discover the team's learning needs. Before going into any deeper analysis you might ask them if the list contains any surprises. Does everyone agree with the list?

List the work processes

The next part of the process requires them to identify the work processes, and for this they will work with this template:

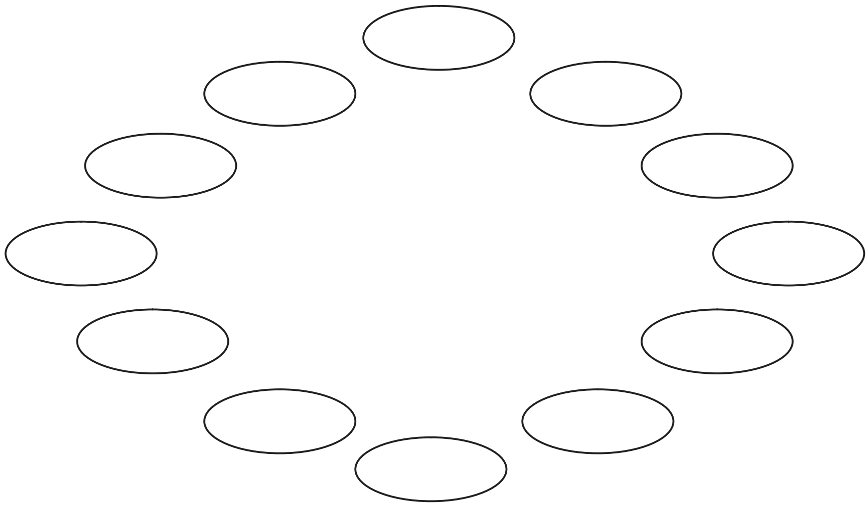


Figure 5.9 Critical work processes

To use this template the team transfers the work processes they have just identified to the ovals on this diagram. If they need more than 12 then draw in extra ovals. Using our example of the trainer, the template could look like this:

Figure 5.10 List the work processes

Record the flows between processes

Having listed all the work processes the team should now consider which processes lead to others, for example 'Brainstorming' could lead to 'Planning', and 'Meeting' could lead to 'Designing'. As you determine the flow you draw an appropriate arrow on the diagram between the two ovals. You can appreciate that some arrows will flow in both directions between two processes – so, for example, 'Planning' could also lead to 'Brainstorming'.

Very quickly the diagram will come alive with arrows showing the flow of activity between the various work processes, but eventually you'll realize that you've captured the main flows. The resulting template could look like this – you'll appreciate that we've deliberately kept this simple to demonstrate the concept. In a real example they'll be many more arrows flowing all over the diagram! (Figure 5.11)

Identify the 'leading' work processes

Now you're ready to identify which work processes are 'leaders' and which are 'followers'. It's a simple matter of counting the arrows both in and out of each process. The numbers show which processes 'lead' and which 'follow'.

- A process with more 'Outs' than 'Ins' is a 'leading' process and will probably have greater impact on your overall success.

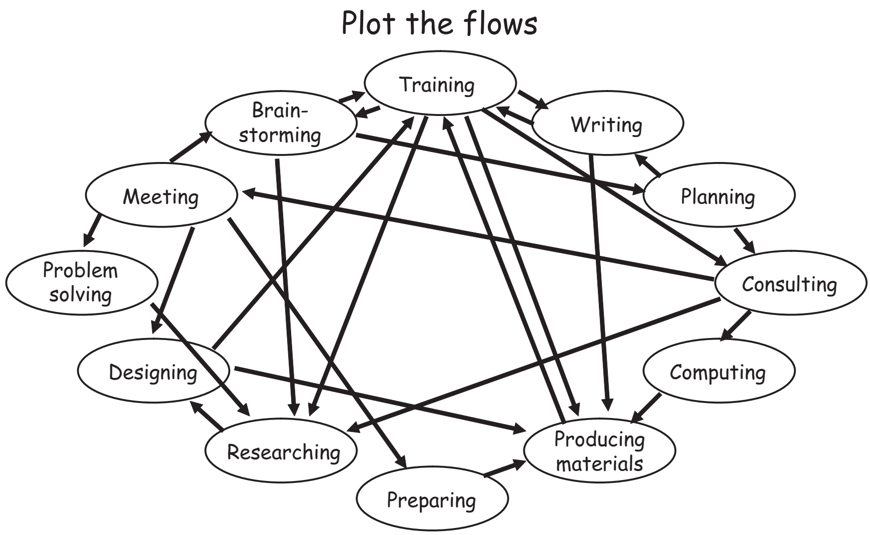


Figure 5.11 Plot the flows

- A process with more 'Ins' than 'Outs' is a 'following' process, and will probably have less impact on overall success.

In our example the results look like this. By the way, please remember that this example is purely to show how the process works – the diagram your team develops will be much more complex!

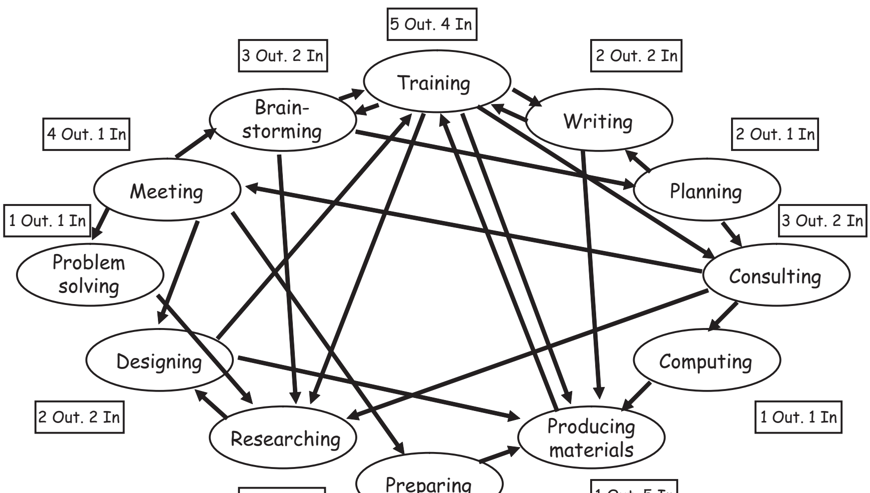


Figure 5.12 Plot the flows

Training.	5 Out and 4 In.
Meeting.	4 Out and 1 In.
Brainstorming.	3 Out and 2 In.
Consulting.	3 Out and 2 In.
Writing.	2 Out and 2 In.
Designing.	2 Out and 2 In.
Planning.	2 Out and 1 In.
Computing.	1 Out and 1 In.
Preparing.	1 Out and 1 In.
Problem solving.	1 Out and 1 In.
Researching.	1 Out and 4 In.
Producing materials.	1 Out and 5 In.

Once you have reached this stage, ask the team to reflect on the outcome. What does it tell them about where they inject their main efforts? Do the results reflect reality?

- Do they currently tend to focus on 'leading' or 'following' processes?
- If they focus on 'following' processes, are they happy with the situation?
- If not, what could be changed?
- How do they compare their confidence or competence with the 'leading' or 'following' work processes? Do they see any imbalances?

Phase 3 – Overall business success

For the final phase of the process, delegates relate the achievement of business objectives to the team's key work processes, to determine their underlying learning needs. Use this template to facilitate the analysis (Figure 5.13)

The team should start with the right-hand column and list their current key objectives – they can do this either as a team or individually. Suggest that they reduce the words to the minimum necessary to understand the objective. Our template could look like this (Figure 5.14).

The next step is easy – simply transfer into the left-hand column the key 'leading' work processes they identified earlier. These were the work processes which had more 'Out' than 'In' arrows. The template now looks like this (Figure 5.15)

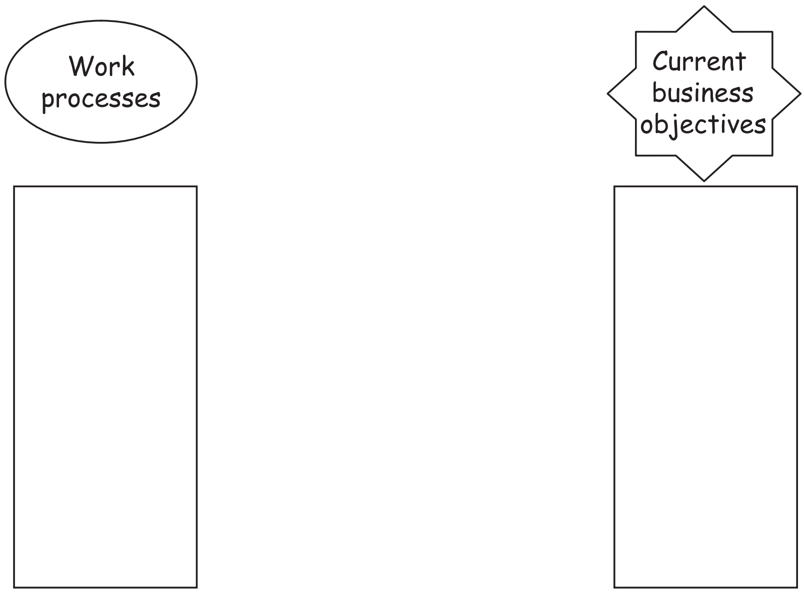


Figure 5.13 Key work processes

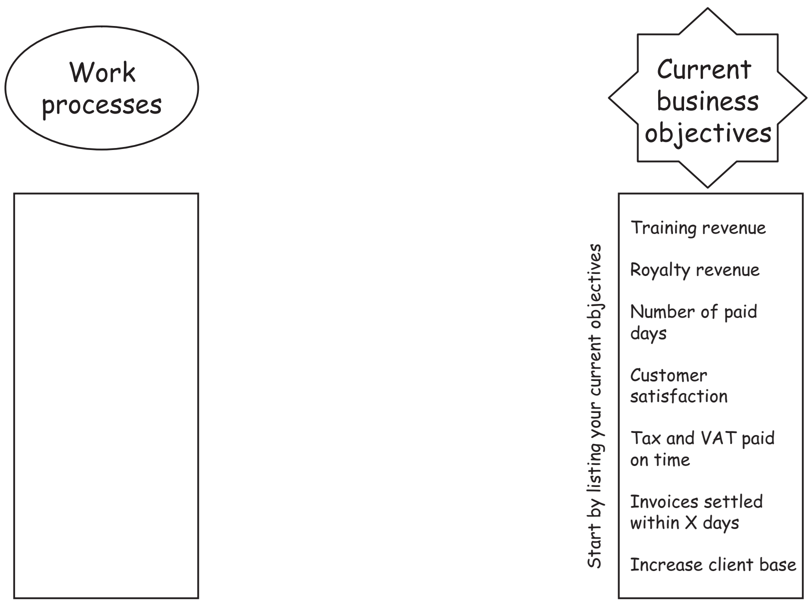


Figure 5.14 List business objectives

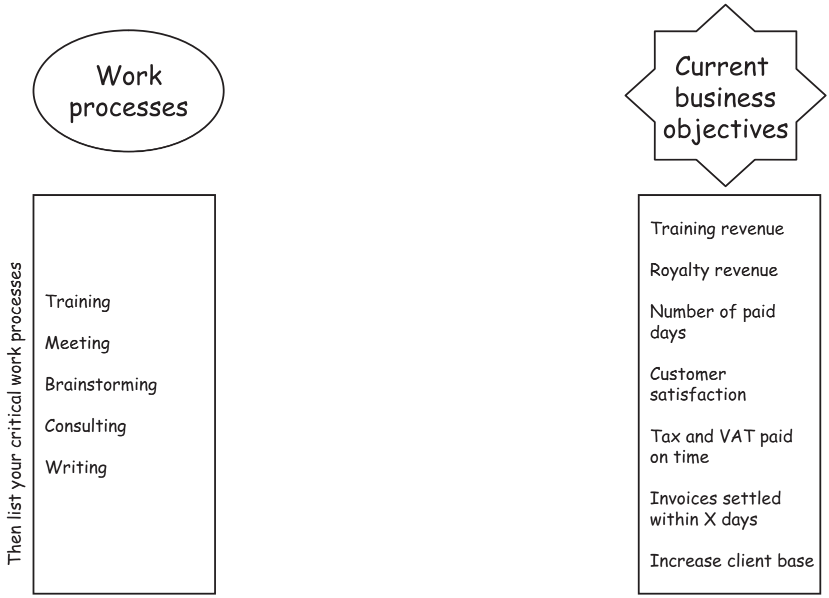


Figure 5.15 List work processes

Phase 3 – Relate success to work processes

Now comes the interesting bit – relating success or failure in achieving objectives to the key underlying work processes. The team should now look for relationships between current objectives [listed in the right-hand column] and the work processes [listed in the left-hand column]. Draw arrows from each objective to the work processes that feed into it, so highlighting interdependencies.

They should ask themselves 'If an objective is not achieved, which key process[es] has failed?' Accept that the diagram may become very messy and that you might wish to use a different colour for each objective (Figure 5.16).

If the team is failing to achieve results in particular objectives, this analysis should help to identify what specifically they need to improve, as it focuses on improving underlying 'enabling' processes, rather than the final objective.

Define the changes in behaviour

For example, if your team worked in sales and wished to improve their revenue-earning ability, the traditional approach might be to set an objective such as: 'To increase sales by 10 per cent'.

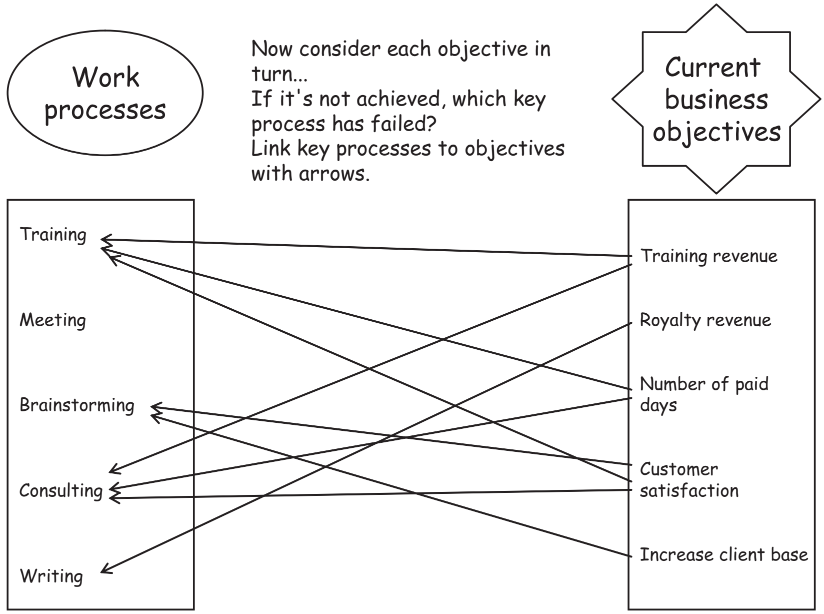


Figure 5.16 Identify weak work processes

But setting this objective doesn't actually help the team members to do better. It simply tells them 'what' is required, without helping with the 'how' to do it. The approach we're recommending here helps the team to focus on, and thus improve, the processes that lead to getting more sales.

Using this approach the team might come to realize that they are underperforming in two of the enabling processes, so essential for achieving more sales: increasing client contacts and interrogating databases.

So the objectives could be redefined as: 'To increase the number of client contacts by 20 per cent' and 'To improve our ability at interrogating database information'. The final step would be to translate these objectives into specific learning needs.

Can you identify any situations where you might use work process analysis to identify learning needs?

Template D: **Define the learning needs.**
Task D11: **Learning needs analysis using work process analysis.**
Duration: **45 minutes.**

5. Summarize the findings

You have now reached the point when you need to summarize the learning needs you have assessed so that you can present the findings to the sponsor for them to 'sign off' the work so far. The following format was used to report on the learning needs analysis for the IT department of Sunshine Desserts GmbH.

LEARNING NEEDS ANALYSIS
on behalf of
SUNSHINE DESSERTS GMBH

Contents

Learning needs analysis

1. Summary

This learning needs analysis (LNA) was carried out in…

2. Outline recommendations

That the results of the LNA should be used to…

3. The brief

The aim of a learning needs analysis is to discover…
This particular LNA focuses on…

4. Background

Sunshine Desserts has experienced rapid growth…

5. LNA methodologies employed

- The lead consultant interviewed a sample of the IT team…
- There were individual meetings with managers…
- Focus groups – four focus groups were held to explore communication issues across teams.
- Observation and informal meeting with members of the IT Group.
- Critical incident recording.

6. Findings

6.1 General

- The positives
- The negatives

6.2 Recent non-technical courses attended

Members of the team had attended various courses including…

6.3 Current identification of training needs

This survey has discovered…

6.4 Training needs expressed from interviews and focus groups

The survey revealed some underlying needs for…

6.5 Specific training

During the interviews, it became apparent that there were quite specific training and development needs…

6.6 General training

There were certain aspects of training and development which would apply to all staff…

6.7 Refresher training

Amongst the more experienced members of staff, there was some interest in refresher training…

6.8 Professional qualification/certification

A need was expressed by some staff to…

7. Conclusions

The key conclusions are:…

8. Recommendations

That training and personal development…

Appendix 1

Interview – sample questions

1. Please tell me your current job title.
2. How long have you worked here?
3. How many people report to you/how big is your team?
4. What do you perceive to be the single biggest issue for:
   - you as a manager?
   - you reporting to your own manager?
   - your team?

5. Looking now at the appraisal system:
   (for managers) What would help you to better monitor performance and motivation?
   – As an appraisee: how useful is it as a tool for upwards communication and for identifying your L&D needs?
6. What immediate training needs do you think need to be addressed
   – for yourself?
   – for your team?
7. For you, what are the particular challenges of working with 'clients' across Sunshine Desserts?
   – Can you give specific examples?
   – How have they been/are being resolved?
8. What specific training could be put in place to address the above issues?
9. In what way might lessons learned be developed into Best Practice?
10. Would you say that communications within Sunshine Desserts are working well, are satisfactory or could be improved?
11. Please let me have example(s) of what is working well.
12. What gets in the way of good working relationships?
13. Do you have any ideas as to how these negative aspects could be reduced/eliminated?
14. If you could suggest an appropriate training response, what would it be?
15. Now regarding communications between the IT department and the rest of the Group: please say where these are working well (examples) and where they could be improved.
16. Over and above the training needs you have already identified, what non-technical skills do you feel you would like to develop further?
17. How would you want to make use of these skills?
18. Any other observations or comments please?

Appendix 2

Focus groups – sample questions

1. Please explain your current job. How long have you been doing it? What training have you so far received?

2. Let's look at communications: How are communications working within Group IT? Are they improving? Staying about the same or getting worse? Please give examples from your team.
3. How effective are communications between IT and the rest of the Group? Examples, please, from your team of the successful and not so successful.
4. Working in your team with your clients, what particular skills that you use now do you feel could be enhanced?
   – Please give examples of the skill and the situation in which it is used.
   – How do you feel this could be best done (Training? Coaching? Other forms of development?)
5. Working in your team with your clients, are there particular skills that you wish you had/would like to develop?
   – Please give examples of these skills and the situation(s) in which they could be employed.
   – How do you feel this could be best done (Training? Coaching? Other forms of development?)
6. Are there any other aspects of training and development that you would like to discuss
   – for your team?
   – for the Group?

Appendix 3

Critical incident log

As part of the learning needs analysis it will be most helpful if you can record any particular moments which relate to *non-IT skills /competencies* you use, particularly when communicating with your 'clients' either over the phone, via e-mail, or in face to face meetings.

These moments will demonstrate the kinds of demands placed on you and your colleagues and will help identify any learning needs.

Please also record your 'successes' – ie when things went right and issues were satisfactorily resolved. We can learn a great deal from these.

Please now consider how you will report the findings of your learning needs analysis, and draft the outline in Template D.

Template D: **Define the learning needs.**
Task D12: **Summarize the findings.**
Duration: **1–2 hours.**

6. Sponsor's formal 'sign off'

The final action to take in Step 'D' is to consult your sponsor and get their 'sign off' for the work done so far. Do they agree the findings of the learning needs analysis and, if not, what further evidence do they require?

You can't move forward from this point until you have their agreement, which you should get in written or e-mail form. Just in case things change later!

So the final Task for Template D is to seek the sponsor's formal agreement to the results of the learning needs analysis, and have documentary evidence.

Template D: **Define the learning needs.**
Task D13: **Sponsor's formal 'sign off'.**
Duration: **10 minutes.**

6

Explore the learning options

1. Step E of the DESIGN model

We are now ready to embark on Step E of the DESIGN model, which explores the learning options.

Purpose

- Confirm that a learning solution is appropriate.
- Write a proposal which highlights options and the preferred courses of action.

Inputs

- Agreed learning needs analysis from Step 1.

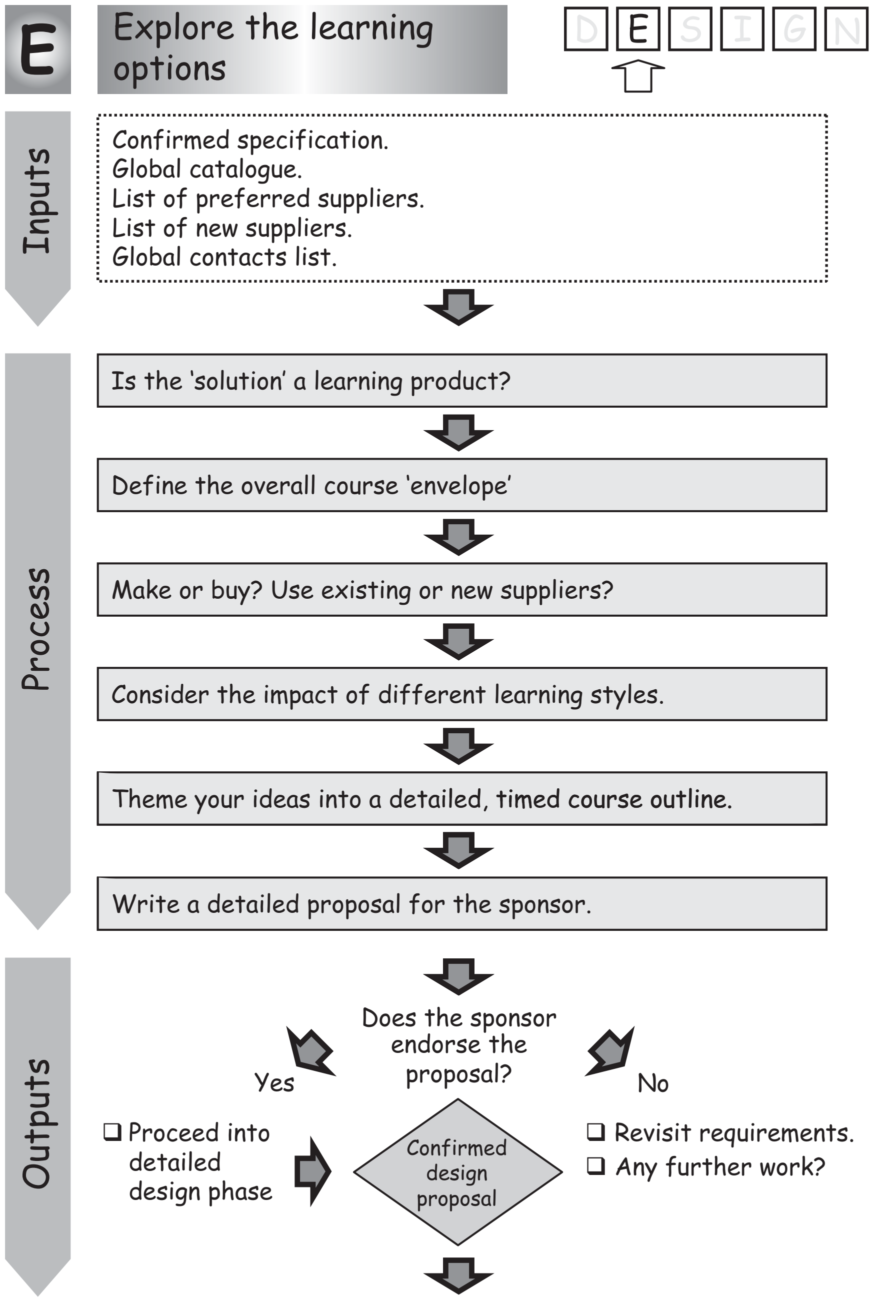


Figure 6.1 Explore the learning options

- The company global catalogue of existing courses and resources.
- The list of preferred suppliers.
- The list of new suppliers and their products.
- Global contacts list.

Actions

- Confirm that a learning solution is appropriate.
- Are there any existing products in the company worldwide catalogue which are acceptable?
- If so, would they require significant language/cultural modification?
- Do any of our existing preferred suppliers have acceptable products?
- Do any other external providers have acceptable products?
- Consider learning methods and delivery options.
- Identify design phase resources – people, time and budgets.
- Consider 'life-cycle management' – how long will it be 'on the shelf' and who will manage it?
- 'Make' and/or 'buy' decisions taken.
- Write an outline design proposal.

Outputs

- Learning design proposal.

2. Open a new template

If you are using the book to build up a complete design you will need to open a new template.

- You can access the online materials using www.koganpage.com/resources/books/TrainingDesignManual/ and the password is TD1917.
- Find 'Template E – Explore the learning options'.
- Copy it to your drive and rename it.
- For example, if you're developing a recruitment and selection course you might rename it: 'Rec & Sel. Template E – Explore learning options'.
- Keep the file open and, as we come to appropriate tasks in this chapter, simply enter your responses in the appropriate sections.

3. Is training the solution?

By this stage you've completed a comprehensive learning needs analysis and the sponsor agrees with the overall results. Now you need their authority to do something about it, and the first question refers back to why we called the earlier chapters 'learning needs analysis' and *not* 'training needs analysis'.

You may have uncovered many performance gaps – where the current performance fails to meet the required level of performance. And, because we're trainers, it's tempting to think that training is the most appropriate solution. Let's use the following flow chart to walk through the next piece:

So you've identified a performance gap. Imagine yourself asking the person with the performance issue: 'If I gave you £XXX could you do it?'

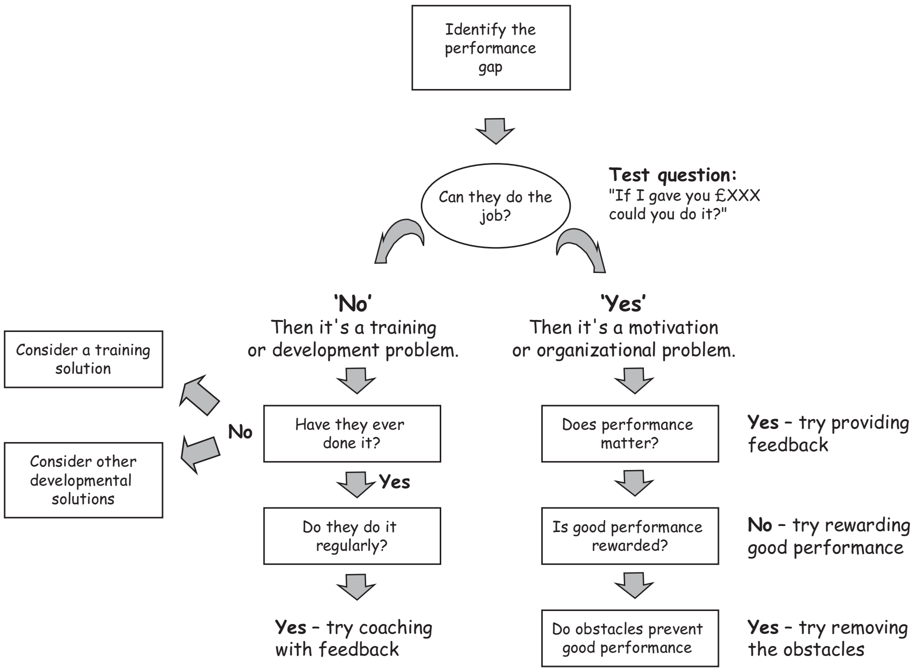


Figure 6.2 What's the gap?

'Yes – I could do it'

If you think they would answer 'Yes', then their under-performance is a matter of willingness, corporate culture or departmental barriers, and no amount of training will change things. The solutions for these performance-related problems will go much deeper than you can probably deal with. Some of the questions which need to be asked include:

- Does performance matter? If the answer is 'Yes' then try providing feedback.
- Is good performance rewarded? If the answer is 'No' then try rewarding performance differently.
- Do obstacles prevent good performance? If the answer is 'Yes' then try removing the obstacles. Get the rocks off the runway!

The managers of the departments concerned will need to search for other solutions, which may include motivation, different equipment, new processes, changed working practices, organizational changes, environmental issues etc. As you can appreciate, these won't be a 'quick fix' and must be in place before any training starts, or it will be a complete waste of time.

On several occasions I have been asked to recommend a training solution for an organization and, after conducting a learning needs analysis, I have reported back to the managers that I have revealed an underlying issue that needed to be addressed first before the focus could switch to training:

- On some occasions I was able to help the company to address these issues, before turning to the training solution.
- But several other times I had to walk away – if the training had been delivered as requested, the only observable change would have been to my reputation!

Please take a few minutes to consider – are there potentially any underlying performance issues for which learning or development will not be a solution?

Template E: **Explore the learning options.**
Task E1: **Learning or development won't solve this!**
Duration: **20 minutes.**

'No – I can't do it'

If, however, you think they might answer 'No' then you can go down the left-hand side of the flow chart and look for training and development options. Don't get too excited yet – you've still some other solutions to consider before you recommend 'training' as *the* solution. Depending on your situation you may be able to offer some or all of these additional developmental opportunities:

- secondments;
- project work;
- temporary promotion;
- self-study using books or multimedia;
- watching video or DVDs;
- surfing the net;
- coaching;
- open-learning;
- shadowing an experienced person;
- professional development or qualification;
- on-the-job development;
- being mentored;
- learning from other people or companies doing a similar role.

Which of them looks promising depends entirely on the situation. Your role is to recommend a package of solutions which represent the most productive, stimulating and cost-effective way of developing people's abilities in the required areas. Referring back to your own situation, can you see any development opportunities, other than training, which might be appropriate?

Template E: **Explore the learning options.**
Task E2: **Consider learning and development options.**
Duration: **15 minutes.**

Analysis not paralysis!

Confronted with all the data you've collected it's very easy to feel overwhelmed and not to know where to start. I am a great believer in Post-it Notes whenever I feel 'information overload' coming on. [If you're interested in learning about other applications for Post-it Notes in training, you may be interested in 'Training that sticks' published by Fenman.]

As you look through all the data you've collected, just write the key points of each element on its own Post-it Note. At this stage don't try to make sense of anything – just keep writing until you've got a rash of Post-it Notes on the wall. Now stand back and look for themes, moving the Post-it Notes so that they form groups of related topics. Gradually you will begin to see patterns emerge and these could be the start of your training plan and, ultimately, your proposal, if you have to do one.

Sifting through the data and developing your ideas on how the training can be designed and delivered is not a cold, mechanical process but one that involves reflection and discussion. Don't try to do this alone – you will get a much better result by working with others. Using the Post-it Notes enables ideas to be moved and grouped, and then regrouped as different thoughts emerge.

4. Define the overall course 'envelope'

Let's assume you have decided that training is the solution. One of the key issues to clarify as you ponder your data is the overall course 'envelope'. Aeronautical engineers use the phrase 'envelope' to describe the whole set of performance criteria within which an airframe must stay if is to be safe, so we can use the same term to bring together all the criteria for your training event. You know the sort of issues – the objectives, the duration, how many people, residential or day job, trainer-led or e-learning, etc.

Learning outcomes

Early on you will need to confirm exactly what the sponsor expects delegates to gain from the training, and this needs to be 'signed off' by the topic owner before you can start to formulate your proposal. Once this is clear you can start to fix the overall design 'envelope' within which your course needs to fit. Let's consider each of the key elements individually.

Duration

How long should the course last? In an ideal world you would collect your thoughts, arrange the topics for the best flow, and strike the optimum balance between theory and practice. Only once you have done all that might you decide, for example: 'This is a two-day course.'

But generally the real world isn't like this anymore. Instead it's quite likely that your sponsor will tell you in the first minutes of your discussion: 'The longest we can spare people away from their workplace is…'. The challenge for you is then to get the best fit between what you would like to do, and what you can realistically do, in the available time. Very few organizations nowadays can afford the luxury of generous, or even adequate, time for courses.

As you discuss how long the course should last, you might wish to bear in mind these guidelines:

- One to two hours is good for evening sessions devoted to continuing personal development. But make them interactive or the delegates will fall asleep!
- Half-day is great for 'refresher' sessions, or some topics like minute-writing skills where you can cover all the concepts and still give time for practice.
- One day is ideal for many topics as it allows a fast-paced course to cover key theory, with some time for participation and interaction, for example time management and writing skills.
- Two days are essential for courses where you need to cover theory and provide a greater amount of time to practise the skills, for example presentation skills or recruitment interviewing.
- Three days and more – required for courses where there is a greater amount of theory to grasp, probably coupled with the need to demonstrate mastery of the skills.

Start and end times

As you decide when to start and end your course, you need to recognize that you will be largely conditioned by people's normal working hours.

- If you try to start earlier than they are used to, you will find people drifting in over an extended period, which makes it difficult to make a high-impact start.
- Similarly, if you plan to end later than they are used to, you will find people's concentration starting to lapse, or some individuals needing to leave before the end because of travel or child-care problems.

Residential or not?

For many courses, especially the short ones, there is no debate about a course being non-residential, but the question will arise for longer courses, or in situations where delegates need to travel from geographically dispersed sites.

Advantages of residential courses:

- More time available as you can work into the early evening, or start earlier on subsequent mornings.
- People get to know each other better.
- People often relax more as their domestic issues can be put aside.
- More relaxed pace as there's less pressure to cram it all in.
- People travelling from afar have time to adjust before the course starts.
- Opportunity to build teams and break down barriers.

Disadvantages of residential courses:

- Costs will be much higher as you are housing and feeding people overnight.
- Some people will be unable to stay overnight owing to personal circumstances.
- Avoid the temptation to work too late into the evening.
- Some people feel threatened or uncomfortable with the continual social immersion with the other delegates.

Number of delegates

How many delegates to have on a course? Bear in mind the following guidelines developed from past experience. It's important to agree this upfront – if the sponsor suddenly decides that the number of delegates needs to increase from eight to twelve you may have to redesign whole chunks of the course.

- *One-to-one.* This may be the only way for the most senior managers or professionals in an organization to receive feedback on their performance. It's very intensive as you don't get a break from each other.
- *Up to three delegates.* Good for advanced presentation skills or similar courses where you need to give a small amount of theory, but most of the course is devoted to individual presentations, followed by in-depth feedback.

- *Up to six delegates.* Ideal for standard, two-day presentation courses as it gives the optimum balance of theory, presentations and feedback.
- *Up to eight delegates.* Ideal for most interpersonal skills courses, as it gives a good balance between the variety of ideas and experience the delegates bring, and a comfortable number for the trainer to give individual attention.
- *Up to twelve delegates.* The maximum the author will normally work with on a conventional training course.

The exceptions to these guidelines include:

- *Networking sessions.* Courses on networking work much better the more people you have in the room because it not only allows them to practise the skills you're exploring, but enables them to do some real networking.
- *Complete teams.* When you're asked to run an event for a complete team, for example the management team at a particular location, or a complete department, then obviously you have to take the *whole* team. Leaving just one person out gives people a let-out clause for not having to change.
- *Open courses.* You may be asked to design an open course, which may last from several hours to a full day, when an unlimited number of people may attend.

The fundamental issue is that, in general, the more people you have the less interaction there is between the trainer and the delegates. So it tends to be more theoretical with less opportunity for participation. But it's not always the case.

The largest audience I worked with was over 2 million when I did a series of 6-minute sessions for breakfast TV on three successive mornings. The session on the first day was about adopting a 'can do' approach and, during the session on the second day, a caller rang in to discuss their experiences. Fortunately, they agreed with what I had said on the first morning!

But that felt scary – having the presence of mind to deal confidently with an unknown topic in front of a live TV audience. So just because there are more people it doesn't automatically mean that you have little interaction with the audience.

Method of delivery

This is an important topic to clarify with the sponsor and, put simply, you have three main choices: trainer-led, self-study or a blend of the two. Let's examine the pros and cons of each choice.

Trainer-led courses – advantages

- Gives opportunity to practise skills and receive feedback.
- Delegates interact with each other – discuss common issues and concerns.
- The trainer can modify the content or flow to meet the delegates' needs.

Trainer-led courses – disadvantages

- The pace is determined by the slowest delegate.
- Delegates will have varying levels of knowledge of the underlying theory.
- Expensive in terms of person-hours and venue costs.

Self-study – advantages

- People can acquire new skills when they need them, instead of waiting for the next scheduled training course.
- Students can choose their own learning path to suit their prior knowledge of the topic.
- Minimum disruption to normal work, as people can study at times convenient to them.
- Students can revisit sections they find challenging.
- You can use multimedia – text, sound and vision.
- You can build in clever animations to explain complex topics.
- You can train a lot of people in widely spread sites in a short time.
- Delegates receive a consistent message irrespective of when or where they are trained.

Self-study – disadvantages

- Can feel very lonely, especially if you're struggling with a section.
- You're reliant on people completing all sections of the work.
- Take care about using 'right' answers.
- E-learning solutions – the upfront investment can be high, so use it for carefully selected topics.
- E-learning solutions – once designed, the course is expensive to modify.

- E-learning solutions are very dependent on the quality of your IT network.

Blended learning

Increasingly companies are looking to bring together the best of trainer-led and self-study solutions, particularly using e-learning. These 'blended learning' courses typically offer the learner a two-stage learning experience:

- First, they study an e-learning package, which covers all the theory they need to know about the topic.
- Then they experience a short, normally one-day, trainer-led course when they get to practise the key skills they acquired through the e-learning.

Blended learning – advantages

- Keeps delegates' non-revenue earning time to a minimum.
- Allows key skills to be practised.
- No need to devote time to covering underlying theory.

Blended learning – disadvantages

- Not all delegates will have completed the e-learning course or, if they did, it may be some time ago.
- There's limited time for discussion about delegates' issues or concerns.
- The time pressure means that that there's no time to introduce new concepts or models.
- Without some follow-up coaching, whether 'live' or online, it's easy for the newly acquired skills to wither.

Venue and equipment considerations

Although the choice of venue will be more of an issue when it comes to the actual course delivery, there may be specific equipment or facilities which must be available for the course to be effective, and these may have to be defined in the course design. For example, you may need to:

- ensure that your venue can welcome delegates irrespective of their mobility or visual capabilities;

- have access to IT or other specialist training equipment to enable the delegates to develop their skills;
- select venues with suitable outdoor training facilities if that's part of the course design.

How many trainers will be required?

This is an important issue to consider early on as it will affect the way you design the course. In general, if you follow the guidelines on numbers of delegates we outlined above, one trainer should be able to manage quite satisfactorily. However, there may be situations when additional trainers are justified:

- The course design may require delegates to work in small teams which require trainer input, facilitation, observation or feedback and one trainer simply can't manage – eg development centres.
- There may be parts of the course which require specialist knowledge that the 'main' trainer doesn't have, for example managing outdoor activities safely, etc.
- The course may involve fast changeovers to different tasks or activities so, whilst one trainer is managing the group, the other can be preparing the next activity.

Will you need any guest speakers?

A similar consideration is the need for guest speakers:

- There may be topics which are so specialized that few people have the required level of knowledge or expertise – so you need to invite a guest speaker along.
- There may be other topics for which, although your own trainers could do equally well, bringing along a guest speaker with acknowledged expertise or reputation will dramatically enhance the acceptability of what they have to say.

If you're considering using guest speakers there are several additional points to consider:

- Do you have the budget? Guest speakers will cost you, and not just the direct fees but also the additional items associated with travel, accommodation and 'meeting and greeting'.
- You will need to get the dates into their diary early – many months ahead of the planned date.

- Have a 'fall back' position in case you can't get the person you want, or circumstances change and their involvement would no longer be acceptable or desirable.

Considering any 'unusual' events or activities?

Sometimes it's decided to include 'unusual' events or activities, such as go-karting, rock climbing, walking on hot coals, horse whispering – the list is endless. If you're considering any of these, just a few additional considerations are:

- Time – it will certainly eat into precious time.
- Cost – involving specialist activities will hit your budget hard!
- Travel – you may need to travel to a different location.
- Distraction – will everyone see the relevance of the experience?
- Threats – some people may see the activity as threatening.

You need to carry out a ruthless cost–benefit analysis before committing to these types of activity. I can remember very clearly meeting some delegates from a work conference who had been out the previous evening for a team-building session at the local go-kart track. But the evening had ended rather early when two karts collided, injuring both drivers, who then spent most of the night in the casualty department of the local hospital!

Please take a few minutes to consider the factors which will define your course 'envelope' and enter them in Template E.

Template E:	**Explore the learning options.**
Task E3:	**Course envelope.**
Duration:	**15 minutes.**

5. Make or buy?

An important decision is whether to develop the courses or workshops internally, or to buy-in resources from an external training provider. External suppliers could either provide you with an existing course or, for extra cost, design something new especially for you. If you struggle with this issue, why not use these selection criteria to guide your decision-making process:

- Do we have it already? Check the company catalogue of existing courses and resources to see if you have a product which is a good fit, or could be modified easily.
- Check preferred suppliers. Do they have a product which is a good fit, or could be modified easily?
- Lastly, check new suppliers. Do they have a product which is a good fit, or could be modified easily?

If you work in a large company you'll be amazed how many courses are designed in separate departments, and the people in the next office are quite unaware of what exists. Remember – there's only one sin worse than redesigning the wheel – and that's paying a consultant to do it for you!

Credibility

- Buy-in existing external products. The external facilitators who run the courses are more familiar with the issues and possible solutions than internal facilitators might be.
- Develop internally. Your staff will attribute more credibility and relevance to the event if it is obviously developed internally.

Costs

- Buy-in existing products. The costs of buying-in the programmes is less than the cost of resources and staff development time required to produce a programme of the same quality.
- Develop internally. Consider the price of the course you're planning on a cost-per-person basis. If you need to train a significant number of staff, a programme developed internally would be significantly cheaper.

Content

- Buy-in existing products. The content and objectives of the course under review might provide such a close fit with your needs that you could not justify developing a programme yourselves.
- Develop internally. A workshop to meet your training objectives may require frequent revisions or updating, which is easier to do with an internally developed programme.

Time

- Buy-in existing products. You can't afford the time to develop and refine an internal programme. The courses you'll be buying-in are fully proven and validated, and will be fully effective from the very first event.
- Develop internally. Developing a course around the specific needs of your staff is more valuable than the staff time and other costs you would save by buying-in an existing programme.

Design capability

- Buy-in existing products. The people who designed the event being considered have more design experience for this topic/objective than your internal training designers have.
- Develop internally. Your internal course designers have enough resources and experience to develop a programme that will satisfy your training objectives in every way.

Specific

- Buy-in existing products. Buying-in one of the programmes under review will free up staff development time for courses you will have to develop internally.
- Develop internally. The training objectives you have are so specific to your organization that it would be difficult to modify any packaged training programme to meet them.

Culture

- Buy-in existing products. The programmes being considered are developed from resources that are more sophisticated or specialized than internal resources.
- Develop internally. Management policy or organization culture strongly supports internal development of training programmes.

Before moving on, you may wish to consider whether you will be using internal or external resources for the course you're considering.

Template E: **Explore the learning options.**
Task E4: **Make or buy?**
Duration: **15 minutes.**

7

How people learn

1. How people learn

So far you've made a good start on the training design journey, by establishing the learning needs and gaining the sponsor's agreement that training is the appropriate solution.

The next logical step surely is to start the actual design itself? Yes, but before we do that we need to refresh our ideas about how people actually learn, otherwise we can easily design training that fits with the way that we learn best, which isn't necessarily the best for our delegates. *'That must be the best way, after all, that's how I learn.'* Just think back when you learnt to do something new or different – perhaps it was:

- struggling with the new package on your personal computer;
- assuming new responsibilities at work, perhaps involving promotion;
- learning a new hobby or sport;
- adopting a new role in life, for example becoming a husband, wife or parent.

What did you feel like as you found yourself in the new situation? How did you learn the new range of skills or knowledge? If you were to compare your experiences with a friend or colleague who had been through the same experience, you would probably find that they tackled it in a totally different way.

For some years I enjoyed cruising the sky in a high-performance sailplane. Those of you who have also experienced gliding will immediately feel a smile spread across your face as you relive that wonderful feeling of being thrown up into the air at 1000 feet/minute, riding a wild thermal.

One evening in the clubhouse, while discussing the skills of flying instructors, I asked one of them, Tony Mells, how many people he had taught to fly. Tony replied: 'None'. I immediately challenged him: 'Come on – you've done loads of flights in the back seat with me.' [Where the instructor traditionally sits.] 'Ah,' said Tony, 'I didn't teach you to fly. You taught yourself. I just sat in the back and stopped you from killing yourself while you did it!'

Later, as I drove home, I realized that Tony had defined the role of the effective instructor or trainer perfectly, which is to:

- enable our delegates to acquire their new attitudes, skills or knowledge…
- in such a way that they build confidence and competence…
- without harming themselves or others in the process.

And it's made more interesting, some would say 'challenging', because we all tend to learn in different ways. There have been many schools of thought when it comes to learning theory, and we're not intending to reproduce them all here, but let's refresh some of the key concepts.

Behaviourist

The behaviourist approach, one of the early schools of thought, was based on the way we react and learn from circumstances when we are motivated to do so. The classic story of Pavlov's dogs illustrates this approach. A generalized view of this 'one size fits all' training process is 'explain, demonstrate, imitate and practise'.

Structuralist

Using this approach we would present the learner with the end goal and allow them to teach themselves how to achieve that goal. This is based on a form of psychology where the learner teaches themselves by thinking of what has to be achieved and breaking the learning journey into its composite parts.

Cognitive

Adopting the cognitive approach we would design the training environment to meet the individual learning traits of learners, recognizing that people have unique thought and mental processes that affect their learning. When designing the learning environment we should take account of five key mental processes: attention, memory, language, reasoning and problem solving.

2. Climb the learning ladder

Taking on something new

Another useful perspective is to consider the emotions and feelings experienced as we undertake a new task or adopt a new role. While someone may appear quite confident, most people experience a range of emotions, which have been likened to climbing a ladder. To be an effective training designer you need to be aware of these steps, and the impact they may have on your design.

First rung of the ladder

When we tackle something new we generally don't appreciate what's involved in doing it. No matter how simple or sophisticated the task may be – things generally look easier than we imagine. At this stage we are incompetent at performing the task – we simply cannot do it. Worse still, we don't know how much we don't know. So in a nutshell we are *unconsciously incompetent*.

We're sure you can recall experiences as you've undertaken new tasks – you may even be feeling unconsciously incompetent as you begin to design training. To bring the concept alive, let me recount some learning experiences I shared with my elder daughter Jane.

When Jane was about 8 years old she decided she would like to go roller skating. Roller skating was a totally new experience for me – I had never done it myself as a child. Anyway, we found that the local community centre had roller-skating sessions on Wednesday evenings so we turned up, hired some skates and had a go.

The rink was full of people of all ages confidently gliding around. They looked so elegant and it all looked very easy so I confidently moved out onto the rink – and immediately fell over! I struggled to my feet and promptly fell over again! I couldn't control my feet at all – they simply wouldn't do what I wanted them to!

By the end of the evening I realized there was much more to roller skating than I had ever imagined. I had gone to the first session in the blissful state of *unconscious incompetence*.

Second rung of the ladder

The next stage is *conscious incompetence*. Having decided to start a venture we begin to grasp new skills, ideas or concepts. At this stage we are still incompetent but we become aware of how little we know, and what the journey ahead may entail. So we progess into the *conscious incompetence* stage.

The story continues.... The following week Jane and I were still recovering from all the bruises we had developed during the first roller-skating session. The critical question hovering around the house was – would she want to go again? Well, she decided to give it another try and, being a devoted dad, I agreed to go along with her. Of course, this week it was a little easier than the first time; we were both becoming aware of how to control the skates by applying varying pressure and generally starting to feel more in control of things.

We were still very much incompetent and were very conscious of how little we knew – the state of *conscious incompetence* prevailed for a few weeks. Of course, as time went by Jane raced ahead of me, eventually gliding elegantly around the rink demonstrating dance routines.

Third rung of the ladder

The next stage we progress through is *conscious competence*. While we now may be able to carry out the task, we have to do it step by step, and apparently with a lot of concentrated effort. This stage lasts varying amounts of time – for some people and some situations it may pass quickly, while for others it may take a little longer.

Some years later my younger daughter, Andrea, passed her driving test. When she proudly drove us around town in the family car she was so obviously at the *conscious competence* stage. Every move was positively considered and deliberate. We were able to see her progressing through the 'decision–mirror–signal–change gear–manoeuvre' process.

Top rung of the ladder

Finally all the hard work at the earlier stages starts to pay off and you move into being able to perform a task with little conscious thought or effort. After a period of time, and almost without knowing it, you are delivering the required performance standard consistently and with confidence. You have reached unconscious competence.

Andrea now drives safely and smoothly, with movements and decisions flowing quite naturally though a continuous, elegant process. I often wonder how she will react should one day a child of hers asks 'Mum, will you take me roller skating?'

Snakes and ladders

As well as the four rungs of the learning ladder, it's also important to imagine a 'snake' running down from the top rung [unconscious competence] to the lowest rung [unconscious incompetence]. Using the analogy of the 'snakes and ladders' game reminds us that it's easy to slide from the top step to the lowest one. How? There are at least two ways:

- You become complacent and, without realizing it, take shortcuts which steadily reduce the quality of actions or decisions.
- While you may continue to perform consistently, the world around you changes continuously and, if you don't change the way you do things, you will be left behind. Hence the need for continuous personal or professional development.

Applying the learning ladder

Understanding the learning ladder is all very well but how can this help you when you're designing training? If we can explore the feelings people experience at the different steps we will begin to see how our design can help our delegates to climb the ladder successfully.

Unconscious incompetence

Starting with *unconscious incompetence*, people may feel blissfully unaware, complacent or quietly confident. They may be saying to themselves 'It won't affect/worry me!' or 'I can do it easily!' As a designer you need to help people through these feelings in a positive way, so your design may need to:

- provide opportunities for people to realize themselves what's involved;
- break people in gently;
- let people assess the situation for themselves;
- allow them to talk with others who've recently started on or with it.

Conscious incompetence

As people try the new challenge or task themselves they move into the *conscious incompetence* state, and begin to experience some of the following feelings or emotions.

- Frustration – 'Why can't I do this?'
- Inadequacy – 'I'll never do this!'
- Denial – 'I never wanted to do this anyway!'
- Challenge – 'I'm not going to let this defeat me!'
- Realization – 'There's more to this than I ever realized!'

This is a critical moment in the learning experience. If people feel overwhelmed by their initial failures, and they don't get the right support, they may well walk away from the learning situation, convinced that they will never, ever be able to acquire the new skills or abilities. You need to ensure that your design allows time and/or opportunity for the trainer to coax people positively through this critical stage of the learning process.

Some key guidelines to bear in mind are:

- Give people reassurance that they will be able to do it.
- Stress that their reaction is perfectly normal.
- Be patient and offer coaching or guidance as appropriate.
- Ask people to reflect on how they have tackled new situations in the past.
- Encourage those who look as though they might give up.

Conscious competence

Given the right support and encouragement people struggle through the conscious competence state and slowly begin to develop the skills and abilities required of them. The pace at which people move through this phase depends very much on the individual – some racing through while others need more time. The feelings generally associated with the *conscious competence* stage are:

- Relief – 'So I can actually do it!'
- Frustration – 'I can do it, but why am I so slow?'
- Doubt – 'Will I ever be able to perform at the required speed or quality?'
- Satisfaction – 'After all my hard work I have got there.'
- Realization – 'I never realized there was so much to it.'

To allow learners to move through this phase successfully your design will need to allow the trainer to do some of the following:

- Praise success.
- Encourage those who are feeling they still have a long way to go.
- Reassure people who doubt their ability to reach required standards.
- Gently but firmly coach the 'cocky' ones who think they know it all.
- Patiently help people to gradually improve their ability to the required standards.

Unconscious competence

Finally people reach the *unconscious competence* state and a new set of feelings abound, including:

- Achievement – 'It's taken some while but I've finally reached it!'
- Arrogance – 'I always knew I could do it. What was all the fuss about!'
- Satisfaction – 'How good it feels to be able to do it.'
- Complacency – 'I can just cruise now.'
- Laziness – 'How can I cut corners and achieve the same result?'
- Thoughtful – 'How can we make it easier for others learning how to do this?'
- Striving – 'What's next?'

A good design will encourage the trainer to be constantly aware of the variety of emotions learners will be experiencing, and what they need to do to ensure that people exit this phase successfully. The ideas could well include:

- Praise the successful.

- Provide cautious guidance to those cutting corners or taking short-cuts.
- Encourage those who found it a struggle.
- Remind the complacent of the changing world.
- Stimulate and challenge those who see the wider picture.
- Engender a sense of continuous improvement.

The changing role of the trainer

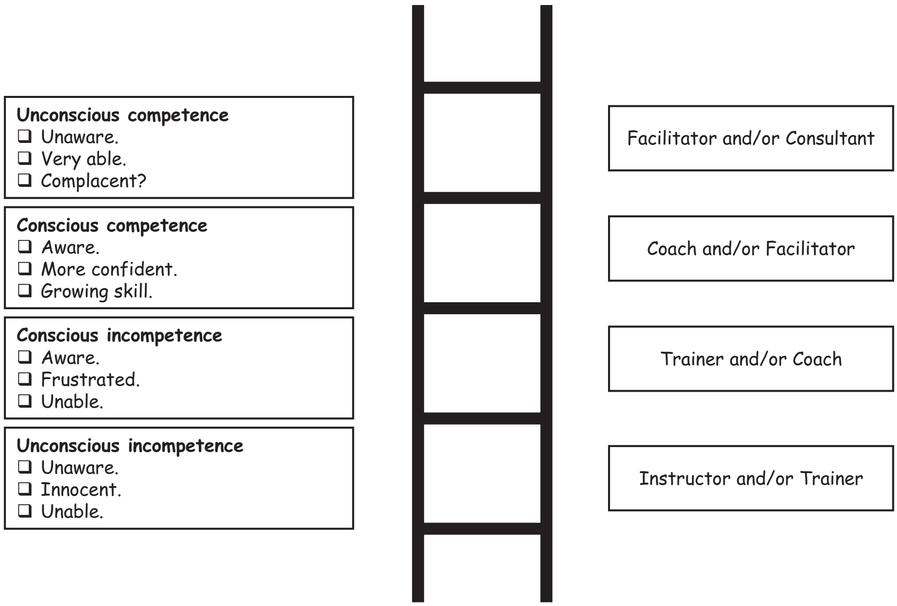


Figure 7.1 The learning ladder

The trainer's role changes as learners climb the ladder, and you need to reflect this in your design. Shown alongside the four rungs are the roles which effective trainers need to be able to adopt instantly, as they will probably have learners on different rungs of the ladder.

Please take a few minutes to consider how you can incorporate in your programme the concept of the learning ladder, and the corresponding roles the confident trainer needs to be able to adopt.

3. The impact of learning styles

Kolb's learning cycle

Let's explore two of the popular theories about the way people learn, starting with the work of David Kolb. He proposed that people progress round a cycle of learning events, the starting point being determined by their own preferred style. The four elements are:

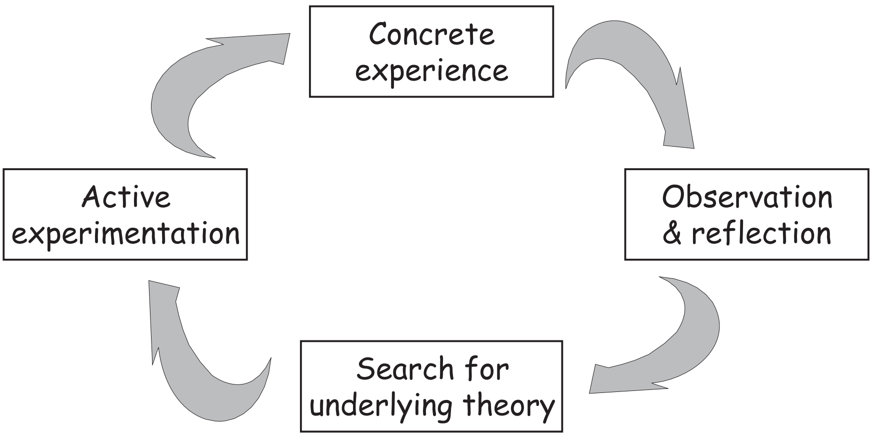


Figure 7.2 Kolb's learning cycle

- Many people like to learn by having a concrete experience, often with limited preparation. Example – many people when faced with a new software programme will say: 'Just let me try it myself – I shouldn't need any help if it's good software.'
- Others learn by watching someone else performing the task or reflecting on what they've seen. Using the software analogy, many people will say: 'Would you show me how to do it before I try myself?'
- Yet others will need to understand the underlying theory before attempting the task themselves. Back to the software: 'Can you let me read the manual first please…'
- Finally there are those who prefer practical experimentation in order to learn. 'I wonder how it might help me to complete that task…?'

While most people progress round all four stages in the cycle, we tend to spend more time at some stages than others, depending on our own preferred learning 'style'. Over recent years David Kolb's work has come in for some criticism as it was based on limited research, and can be taken to imply that everyone processes round all four stages of the cycle. But many people can relate to the underlying concepts, especially when we consider the model alongside the work of Peter Honey and Alan Mumford.

Four learning styles

Peter Honey and Alan Mumford proposed that there are four distinct learning styles.

Activists

- Activists like having a new experience, and will tend to learn best from solving problems, opportunities, involvement, games, or practical exercises.
- These learners like to 'get stuck in', so as a designer you should provide concrete experiences and keep the pace lively and energetic. They often tend to find theory unhelpful.

Reflectors

- Reflectors like watching others, or reviewing what's happened. They need time to think and absorb information before 'doing'.
- Your design should give them opportunities to reflect on events. They are impartial and observant, and like to discuss ideas and thoughts so the pace should allow them time.

Theorists

- Theorists will probably find themselves developing concepts, theories or systems to apply to a problem. They like structure, order and clarity.
- Your design should allow them to explore underlying theories with their analytical and conceptual approach. They thrive on detail and extended discussion, and may have a reduced emphasis on urgency.

Pragmatists

- Pragmatists will be attracted to activities which have an immediate application, or offer the development of transferable skills. They like activities and learning that clearly relates to the real world.

- So provide practical experimentation, as they learn best by projects, tasks, etc. Provide space for small group discussions when they can search for practical application.

Put the two together

It's easy to see how Kolb's learning cycle can be combined with Honey and Mumford's four learning styles to develop a learning cycle, which many people will be able to relate to.

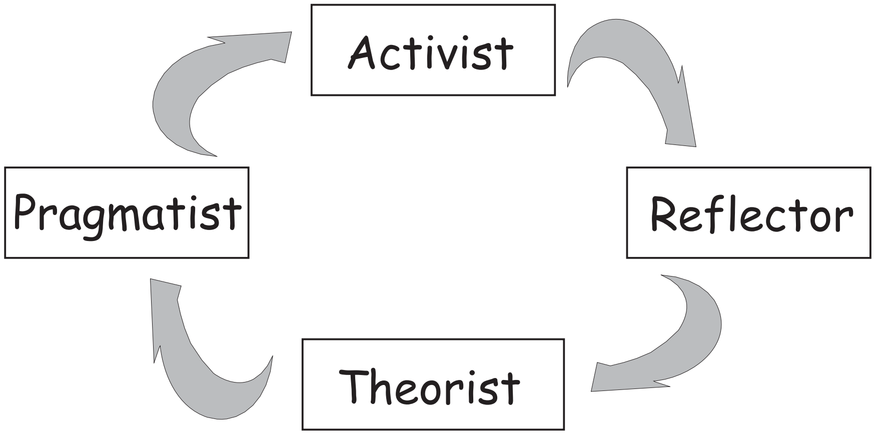


Figure 7.3 Combined learning cycle

People with different learning styles have preferred ways of learning and, if our training design is to be effective, each style has to be catered for. Most of us actually experience all four steps – personal style dictates how much time we spend at each stage and hence where our main learning occurs. Let's illustrate the four steps using a very real experience I had while gliding.

Activist

You have some form of new experience – it may be good, bad, thrilling, frightening, inspiring or depressing.

I was gliding on a less-than-ideal day – there was plenty of lift around but the winds were very strong. After soaring for an hour I decided to land, but quickly realized that I had been blown downwind and would probably not make it back to the airfield.

Concrete experience. Although trained in field landings I wasn't expecting to do my first one that day. I finally landed in a field of cabbages just short of the airfield, having just avoided a line of trees. As the glider came to rest one wing-tip caught the tips of the crops and slewed the glider around through 90 degrees.

Reflector

You reflect on what happened, and review all aspects of the experience. What did it feel like? How long did it last? What did it cost? Who else was involved? What was the end result?

Review the experience. As the glider skidded to a halt my mind went over all that had happened since it was launched. How long had I been flying? How could I have misjudged the strength and direction of the wind? Why did the wing catch and spin the glider around?

Theorist

You draw some conclusions from the experience. How did it happen? What might cause it to happen again? Do I want it to happen again? What might be a better outcome?

Conclude from the experience. What caused me to misjudge the situation? Should I have flown at all that day? How well had I managed the unexpected field landing? How did I honestly feel about my ability to cope with a wide range of flying conditions?

Pragmatist

What can I do differently as a result? Do I need any help? Do I need any extra skills? What materials, equipment or other resources may I need?

Plan the next steps. The first thing I had to do was to report the field landing to the farmer and assess if any damage had been done [luckily none to either crops or glider – but much to my self-esteem!].

Then I returned the glider back to the airfield and resumed the day's flying, having apologized to my companions for their loss of flying time.

In the longer term – I planned to ensure that this would never happen again. I reassessed my criteria for flying on windy days and being more vigilant about the effect of upper-air winds.

If you or your delegates are interested in learning more about their own learning styles, you may wish to consider using the 'learning style questionnaire' which was developed by Peter Honey and Alan Mumford. A less sophisticated, but generally reliable method of discovering someone's learning style is to simply ask them before you start: 'How would you like to learn this?'

Before moving on, please take a few minutes to consider these issues relating to learning styles:

- Which are your preferred learning styles?
- What's your least favourite way of learning?
- How difficult do you find designing training for people who learn this way?

4. Fight the filters

As a designer you need to be aware of yet another set of potential hurdles your training design needs to combat. We each have our own view of the world, which we tend to reinforce by creating a set of 'filters', which allow through only information which accords with our preconceptions and mindsets. The filters allow other information to be 'filtered out' and ignored. The VAKBASIC model shows the filters that every trainer delivering your courses will need to fight through just to reach the processing areas of the delegates' brains.

Visual, auditory, kinaesthetic

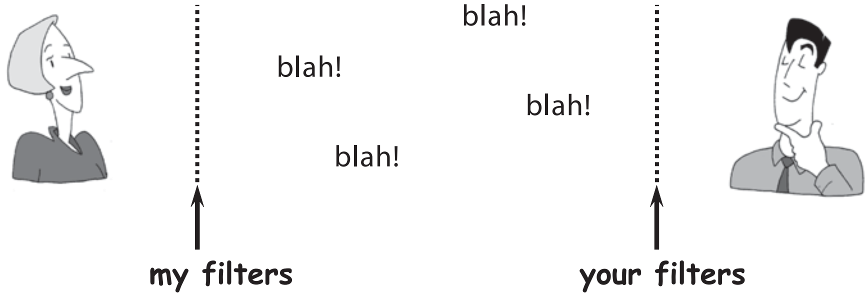
Let's go through the filters one by one. The first filters are those associated with personal communication preferences – visual, auditory or kinaesthetic. Some 80 per cent of the UK population have a strong preference for visual language, with auditory and kinaesthetic being secondary preferences.

Visual people will tend to retain experiences in the form of pictures, so their language will be mainly words associated with images. They will say:

- I need to cast light on the subject...
- It's getting clearer...
- I can see what you mean...

Auditory people will tend to retain experiences in the form of sounds, so their language will be mainly words associated with hearing. They will say:

- That rings bells for me...
- I like the sound of that!



V - Visual. *Some people conceptualize visually…* 'Let me give you the big picture.'

A - Auditory. *Some conceptualize in sounds…* 'I like the sound of that …'

K - Kinaesthetic. *Some conceptualize in feelings…* 'Imagine how you will feel as top performer …'

B - Big/Small. *Some people see the big picture… while others focus on the small detail.*

A - Away/Towards. *Negative thinkers will move away from new ideas… while positive thinkers will be drawn to them.*

S - Same/Different. *Some people like to have the same as before… while others want something different.*

I - Internal/External. *Some want internal success stories… while others value external references.*

C - Convince me. *What will convince me that you are right? Has it been done before? How often? How long for? How many different sites/users?*

Figure 7.4 Fighting the filters

Kinaesthetic people will tend to retain experiences in the form of feelings, so their language will be mainly words associated with sensations or feelings. They will say:

- I'm under pressure…
- Keep in touch…
- I can't grasp that yet…

Having considered the three primary filters, visual, auditory and kinaesthetic, now let's look at the rest.

Filter B

This continuum runs from Big to Small:

- People at the 'Big' end of the spectrum will tend to see the big picture. They are big chunkers and will be irritated by being asked to focus on details.
- Whereas people at the 'Small' end will tend to focus on the smaller elements, the details. They are small chunkers and will find it hard to see the bigger picture.

Filter A

This continuum runs from Away to Towards:

- People at the 'Away' end of the spectrum will tend to see the negative aspects of a situation and will focus on what they don't want to happen and can move away from.
- Whereas people at the 'Towards' end will tend to focus on the positive outcomes they can see. They will talk about the things they want or hope to achieve and can move towards.

Filter S

This continuum runs from Same to Different:

- People at the 'Same' end of the spectrum will tend to look for things being the same or similar to what they currently have. They feel threatened by change or new developments.
- Whereas people at the 'Different' end will tend to seek outcomes which are different from the current situation. They value new experiences or approaches.

Filter I

This continuum runs from Internal to External:

- People at the 'Internal' end of the spectrum will tend to rely on internal references. They will base decisions on their own personal experience, and will be suspicious of changes until they have proved it themselves.
- Whereas people at the 'External' end will tend to welcome the results of external trials or how other people are using a particular approach.

Filter C

The C stands for Convincer strategy, and tells us about what will be needed to convince the person to change the way they do things. There are two common variations:

- Times – how many times will they need to see a result repeated to be convinced?
- Duration – how long will they need to see the proposal in operation before they are convinced?

5. Designing for different learners

Guiding principles

Whichever of the learning style models or concepts you subscribe to, it's clear that you need to design your training events to catch and maintain the interest of everyone who attends. So what does this all mean in practice? We have deliberately covered just a few of the theoretical models associated with adult learning, but this limited coverage enables us to pull together some basic guidelines for you to follow. The underlying principle is to constantly visualize yourself in the target audience and imagine how you would feel moment by moment, taking part in the process you're designing.

Then strive for a balance in everything you design:

- Balance the time spent discussing concepts or theories with trying things in practice.
- Balance the time you spend giving formal input with the time delegates have to formulate their own ideas or share their experiences.
- Balance the time spent working as a whole group with working in small teams.

- Balance 'big picture' with small detail.
- Ensure you provide stimulation for all four learning styles.
- Encourage the trainers to use language and examples which will appeal to all three communication styles – visual, auditory and kinaesthetic.
- Vary the pace – ideally change the activity or the way you are processing it every 30 minutes.

Designing course materials

As you design the materials to support your sessions you'll realize that some options work better for specific learning styles. In general you may wish to consider the following:

Material or approach	*Learning style*
Reference guide	Theorist
Worksheets	Activist, Theorist
Student notes	Activist, Reflector
Scenario cards	Reflector, Pragmatist
Video/DVD	Reflector, Pragmatist
PowerPoint slides	Theorist
Quizzes	Activist, Pragmatist
Flash cards	Activist, Theorist
Practice session	Activist, Reflector

Having explored some of the issues surrounding learning styles, why not take a few minutes to consider how they might affect the way you design your course?

Template E: **Explore the learning options.**
Task E5: **Designing for different learners.**
Duration: **30 minutes.**

8

Develop your proposal

1. Process map the flow

You are now ready to start developing your proposal and we hope you haven’t lost patience with all the ‘planning’ activity in earlier chapters. It’s vitally important and can make the difference between success and failure.

Now you’re ready to start drafting the proposal you may be feeling that familiar sensation of panic. ‘Where do I start?’ ‘What should I include?’ ‘Will I be able to fit it all into the available time?’ From experience the most effective way to tackle this task is use Post-it Notes, or their equivalent, as they’re so flexible:

- You can move ideas around any number of times until you are happy with the result.
- You can easily insert new ideas as they occur to you.
- You can use them anywhere. My partner and I have often designed courses on plane journeys – you'd be amazed how many fellow passengers join in with ideas! You may be one of them.
- Portability. Once completed, the Post-it Notes can be plucked off the surface and popped into a pocket, to be reconstructed anywhere.
- Colour coding. Use different colours to denote varied activities, for example input sessions, team work, guest speaker 'slots' etc.
- You can start anywhere – you don't have to start at the 'beginning'.
- You can work solo or with a team.

An alternative to Post-it Notes is the commercially available planning hexagons, which have a yellow surface on which you write with dry-wipe pens. They are made in different sizes and have a magnet on the reverse side, which allows them to stick to most whiteboards. So you can group them and move them around just like Post-it Notes. Like everything, there are downsides – their reusability is countered by their lack of flexibility and you don't get the freedom of surfaces you have with Post-it Notes. However, the high initial cost is offset by their long life.

Get a rash of ideas

Using Post-it Notes, or the hexagons, for course design couldn't be easier – the first task is to get a rash of ideas. Grab a stack of yellow stickies, find yourself a suitable surface [glass is ideal] and get going. As you think of any idea write it on a Post-it Note and stick it on the wall or glass. The only rule is that you need a separate Post-it Note for each idea.

Once you get started the ideas will quickly flow, so just go with the flow and keep writing until the ideas dry up. Depending on the complexity of the topic and the depth of coverage, you may end up with between 40 and 60 Post-it Notes.

Theme the ideas

Once your ideas dry up, the next phase is to group them into themes or families. This helps you to identify the topics that will ultimately be included in your proposal, and eventually lead to the development of the detailed design.

Start moving individual Post-it Notes into groups of similar topics or themes and you will gradually see a picture or flow begin to emerge, which is the embryo of the final programme. Here are some tips:

- Move from simple ideas or concepts to more complex issues.
- Move from individual skills to a combination of skills.
- Move from moderate to more demanding complexity.
- Look for natural sequences, such as processing a customer's order, or the life-cycle of a product.
- Perhaps follow a chronological sequence – past, present and future.

Have you considered developing the entire programme around a central theme, case study or analogy? [A principle of accelerated learning.] For example, one quality management programme I was involved in was based on the theme of making a journey, so we had a 'railway' theme for the course:

- The course had a railway-style timetable.
- The key tools and techniques were sited at various 'stations' which the delegates visited.
- The facilitators wore appropriate railway kit.
- And the managing director was dressed as the Fat Controller! [his choice!]

When delivering recruitment courses I start by asking delegates to chart the whole recruitment process using Post-it Notes – from initial vacancy through to the new team member joining. We will quickly have more than 40 tasks or individual activities plotted which the delegates order into the appropriate sequence. The sheer number of interdependent tasks comes as a surprise to them, as well as demonstrating why an effective recruitment process takes so long. We then work through the process, spending time on the critical steps along the journey.

Working with the Post-it Notes may prompt you to add further ones as you see gaps. The final outcome is a wall with several well-defined groups of Post-it Notes, which represent the main themes for your initiative. Once the initial grouping is completed, stand back and reflect on what's appeared.

- Does it make sense?
- Can you see an overall pattern or flow emerging?
- Are there any obvious gaps or duplications?
- What do you feel about the overall flow – how will the course delegates react to it?

If you intend to do this initial planning with others then remember to allow time for them to reflect on the outputs. Their 'buy in' at this stage is most important so give them time and space to discuss the outcomes. With lots of people suggesting ideas you can expect to have some duplications. Ask the respective authors to explain what they had in mind when they wrote their idea – you may have two apparently similar ideas which, on further exploration, are quite different. If there are genuine duplications then invite one of the authors to remove theirs.

This is a good moment for you to develop the initial theme for your programme using Post-it Notes, and then enter the result into the template.

Template E: **Explore the learning options.**
Task E6: **Theme the ideas.**
Duration: **45 minutes.**

2. Learning methodologies

Now that you have the overall flow for your course the next step is to decide how each element is to be delivered. There are three main choices: trainer-led, self-study, or a combination. The decision may already have been made for you by, for example, the sponsor, who may have to work within internal political or commercial constraints. But if the choice is yours then consider the following guidelines:

- Trainer-led courses, when a group learn together, are essential for developing skills or shaping behaviours, and the success is very dependent on the knowledge, skills and style of the trainer.
- Self-study, on the other hand, is good for acquiring knowledge, especially as the learner can select which materials to explore, and work at their own pace and at the most convenient times.
- Self-study isn't limited to e-learning, and you will quickly realize that you probably already have a wealth of learning resources available, including: books and training packs; published articles; video tapes; DVDs; audio tapes; interactive videos; one-to-one discussions; and visits.

Although training is normally delivered in a 'training room', in practice it could be delivered in any environment – it just depends on the topic and the industry. As a young soldier our training 'environments' ranged from the classroom to the simulated battlefield, from rifle ranges to bleak moorlands in the dead of night in the hissing rain!

Wherever possible, try to identify more than one resource for each chunk of the course. For example, the variety of learning styles in your target audience means that a video which interests one group may be a real turn-off for others. Before moving on, let's briefly explore the advantages and disadvantages of these different methodologies, starting with trainer-led.

Trainer-led conference

Advantages

- Very large numbers – 100+.
- Good for imparting information or knowledge.
- Learners can choose sessions or subjects relevant to them.
- Lots of opportunity for informal learning and networking.
- Design time to delivery ratio quite high.

Disadvantages

- Can be 'samey' if all sessions are given in a lecture format.
- Little opportunity to test understanding or application.

Trainer-led lecture with Q&A

Advantages

- Imparting large quantities of information or knowledge quickly.
- Should be current, based on trainer's up-to-date expertise.
- People get learning direct from high-quality source.
- Large numbers of people.
- Low design time to delivery ratio.
- Some opportunity for interaction.
- Low cost per head.

Disadvantages

- Not useful for demonstrations or practical application.

- Difficult to check understanding or ability to apply knowledge.
- Not good for behavioural or interpersonal skills.
- Trainer centred – can be dull if variety is not designed in.

Trainer-led structured skills training

Advantages

- Learning practical, technical or interpersonal skills and practising them in a structured and controlled way.
- Good opportunities for trainer and delegate feedback.
- Testing can be easily incorporated.
- Reasonable design time to delivery ratio.
- Moderate cost per head.

Disadvantages

- Practising the skills is often not in a real-world environment.
- Must keep the delegate numbers down to ensure optimum feedback.
- Can be too trainer controlled or centred.
- Less opportunity for learners to drive the agenda.

Trainer-led behavioural simulation

Advantages

- Excellent for interpersonal and behavioural skills.
- Gets as close to the real world as possible.
- Opportunity to practise what the learner wants to practise in a safe environment.
- Lots of opportunity for feedback.
- Design time to delivery ratio quite high.
- Moderate to high cost per head.

Disadvantages

- Sometimes difficult to assess individual capability.
- Limited to small groups – 10 to 20.
- Resource intensive – can be higher cost to stage.

Self-study

Having looked at the group learning methodologies, now let's briefly explore the advantages and disadvantages of self-study, which might be any combination of the traditional distance learning resources or a more sophisticated computer-based learning system.

Advantages

- Learner controls the pace of learning and when it's done.
- Good for acquiring knowledge and information, and certain levels of skills eg language.
- Can be done during or outside working hours.
- Good for geographically dispersed or isolated learners.
- Can cover large numbers of people – from a hundred to many thousands.
- Delivers a consistent message.
- Costs are largely upfront, with low ongoing delivery costs.
- Can be combined with other methods to create pre- and post-learning opportunities.

Disadvantages

- Little opportunity for skills practice, so not good for interpersonal skills.
- No opportunity to question or debate the material unless combined with some form of face-to-face or telephone support.
- Once the design is completed there is no opportunity to make quick changes.
- Materials require more effort and cost to update.

Time for decision

By now you'll have some idea of which parts of your course will be delivered in trainer-led sessions and which might be appropriate for self-study, so it's time for a task. Please look at the Post-it Notes you developed during the last activity and put to one side those which you'll develop as self-study sessions, leaving behind the topics which will be delivered in trainer-led sessions. Store the self-study Post-it Notes carefully as you'll need them later.

Template E: **Explore the learning options.**
Task E7: **Learning methodologies.**
Duration: **40 minutes.**

You have now reached a significant milestone in your course design so number each Post-it Note to preserve the sequence, and ideally write down the order or transfer it directly to a PC. This outline will form the basis for the design of the course and, while it will need refining to allow some small changes to the overall flow or sequence, the basic 'spine' of the course is now in place.

3. Four ways to communicate

Now that you have developed the basic flow for your course, the next significant task is to allocate time to each chunk so you can start to finalize the overall timetable. But before you can do that you will need to consider the way that each session is delivered, as this will have an impact on the time each session needs.

Telling

One popular approach is to use the *telling* style, of which the key characteristics are:

- The trainer or presenter delivers the message with little active involvement from the delegates.
- He/she is explicit about what needs to be done, and how it is to be achieved.
- The delivery will be well prepared, well rehearsed and perhaps involve multimedia visual aids.

This style of communication is most effective when:

- There are specific management or performance messages to be passed on, which allow little or no scope for debate or discussion.
- There are urgent or quick responses to deal with specific situations.
- The delegates are new or inexperienced staff who would be able to contribute little to the discussions.

Selling

Another approach is to use the *selling* style, of which the key characteristics are:

- The trainer 'sells' the idea or concept.
- He/she provides some opportunities for delegates to raise issues or concerns to gain their partial 'buy in'.
- The delivery will again be well prepared, well rehearsed and perhaps involve multimedia visual aids.
- There should also be time for some small group discussions.

This style of communication is most effective when:

- It's important that you gain some degree of 'buy in' to new initiatives or ideas.
- You're dealing with medium term initiatives and there's not quite as much time pressure.
- The audience comprises staff with growing confidence and/or skill and who would be able to contribute meaningfully to the discussions.

Involving

Now let's explore the *involving* style, and the key characteristics of this approach are:

- The trainer essentially leads the delegates through a well-defined decision-making process.
- There is a high level of participation, which ensures the full commitment of all delegates to the resulting outcomes.
- Preparation will focus on defining the desired end results and the process to be followed.
- There should be plenty of opportunity for small group discussions and capturing the resulting outputs.

This style of communication is most effective when:

- It's important that you gain a high degree of 'buy in' to new initiatives or ideas.
- You're dealing with medium-term initiatives and there's not quite as much time pressure.
- The audience comprises experienced staff with high levels of confidence and/or skill and who contribute meaningfully to the development of the business.

Facilitating

Now let's move onto the *facilitating* style and explore its key characteristics:

- The trainer acts as a facilitator leading the delegates through a journey of discovery.
- There is maximum participation and control by the delegates, which ensures their full commitment.
- Preparation will focus on the process to be followed since the facilitator will need to respond 'on the hoof' as the discussions develop.
- There should be plenty of opportunity for small group discussions and capturing the resulting outputs.

This style of communication is most effective when:

- You're breaking new ground, 'blue sky' type of approach.
- You have longer timescales with no immediate time pressures.
- The audience comprises seasoned professionals who contribute meaningfully to the development of the business.

Which to use?

In reality you will probably use a variety of these approaches during any one course – what you have to decide is which is most suitable at any particular moment. And of course they each eat up course time at different rates – *telling* being the quickest and *facilitating* being the slowest.

4. Timing the course outline

Time each session

By now you've got a better idea of how you intend each session to be delivered – is the trainer simply going to deliver the concepts or will he/she involve the delegates to a greater or lesser extent? Having settled this, you can move on to the next major step in the design process, which is to allocate a time to each chunk in the outline timetable. So it's time to go back to the Post-it Notes for the trainer-led sessions and consider each one in turn. Decide how much time each session will need, then write the time [in pencil] on each Post-it Note.

Template E: **Explore the learning options.**
Task E8: **Provisional timings.**
Duration: **20 minutes.**

Employing 'unusual' activities

This early stage of developing the timetable is a good moment to consider if you are intending to incorporate any 'unusual' activities into the design. You recall that we mentioned this earlier in Chapter 6. If you've decided to include any of these 'unusual' events or activities, such as go-karting, rock climbing, walking on hot coals or horse whispering, you will now need to decide how to build them into your timetable. There are two time issues to consider:

- The actual activities will take a finite amount of time, which will eat into the precious time you have available.
- You will almost certainly need to travel to a different location, so you will have to build this in as well. It will take longer than you expect – getting everyone on and off the bus, for example, takes a surprising amount of time.

Working into the evening

It can be very tempting to schedule work into the evening, especially if delegates are being invited to stay overnight in a hotel or residential conference centre. *'They can't complain – after all they're being put up in a nice hotel!'* You'll often hear managers saying this but this can be self-defeating as most people's energy levels quickly flag.

A pattern which is often suggested is to break from the day session sometime before dinner, then expect people to re-energize themselves after their meal and work late into the evening. Of course, a lot comes down to company culture but, given a choice, it's better to work on to say, 6.30 and then close for the day. This approach also allows delegates to enjoy the leisure facilities which most residential conference centres offer – a bonus most delegates relish.

If evening working is to be scheduled then try to make it a fun activity. I once had to facilitate a challenging team-building workshop for a team who managed the sales of duty-free products in Europe. The sessions during the day were tense and conflict-laden so we had to lighten the mood for the evening. So for the after-dinner event we divided them into four teams, and their challenge was to produce a fun, 5-minute video marketing a new duty-free opportunity for their products in Europe. To add an extra bit of fun each team selected at random two fancy-dress costumes, one male and one female, which had to be woven into the story somehow. The teams chose from:

- Mexican bandit
- Panto 'Dame'
- Olive Oyl
- Nun
- Denis the menace
- Cleopatra
- Fred Flintstone
- Convict.

The cost of hiring the costumes was modest and greatly enlivened the activity. Afterwards we had an Awards Ceremony when 'winners' from various categories were awarded miniature Oscars for their efforts. One of the most notable was the guy who squeezed into Cleopatra's dress – he looked quite stunning and never lived the event down!

Ebb and flow of energy levels

People aren't machines so as a designer you must recognize and work with human energy peaks and troughs. The evening isn't the only time you need to be wary of – there are other times throughout the day when people are more or less active, or more easily stimulated. Some of the obvious guidelines are:

- Try to limit sessions of input or theory to the morning.
- Certainly avoid less-active sessions straight after lunch or towards the end of the afternoon.
- Devote after lunch or late afternoon to active sessions or team working.
- Have shorter, more frequent breaks instead of infrequent, longer breaks.
- If using video, have short bursts rather than longer sessions – otherwise you'll feel the energy levels sagging around the room.
- Be able to keep the ambient light levels in the room – don't turn down the lights or people will fall asleep.
- Design activities which encourage people to get up, meet and work with different people.

Squeeze into the 'envelope'

All of these considerations will have an impact on when during the day particular activities are scheduled. So once you've done some adjustments, moving things back or forwards, gradually things will settle down and a pattern will emerge.

The next stage can often be quite a surprise! Add up the times from each session and compare it to the total time available for the course. In general you will find that the sum of the parts exceeds the time available. If that's the case you have several options:

Option 1. Go back to the course sponsor and ask for the course duration to be extended.

Option 2. Decide which sessions must stay and which must have the full time you've allocated.

Option 3. Decide which sessions must also stay, but for which you can reduce the time you devote to them.

Option 4. Decide which sessions can be relegated to the 'nice to have' category and be delivered if you find you have extra time.

Assuming that you haven't had a sprinkling of 'magic dust' and had the course duration extended, by a combination of options 2, 3 and 4 you will be able to reduce the overall time to fit the time available. Let's turn theory into reality and return to your course design.

Working with your set of Post-it Notes, total the time for the individual sessions and, by a process of adding and deleting, mould your outline so that it fits the overall time you have available.

Template E: **Explore the learning options.**
Task E9: **Final course outline.**
Duration: **30 minutes.**

5. Sunflower analysis

Working through this chapter will have made you aware that you need help or support from a wide variety of people to enable you to get the design process under way. To help you plan effectively you may wish to use sunflower analysis – it's called that because the final diagram vaguely resembles a sunflower.

This is how you use it. Start by drawing a circle in the centre of a sheet of A3 paper, in which you write the project or task. Like this:

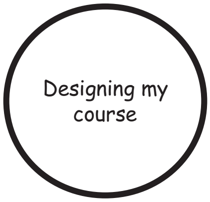


Figure 8.1 Sunflower part 1

Now draw a ring of 'petals' in which you write the names of the people, departments or organizations whose help or support you'll need. We've shown eight petals but you don't need to be limited to that number. The diagram starts to grow and now looks like this:

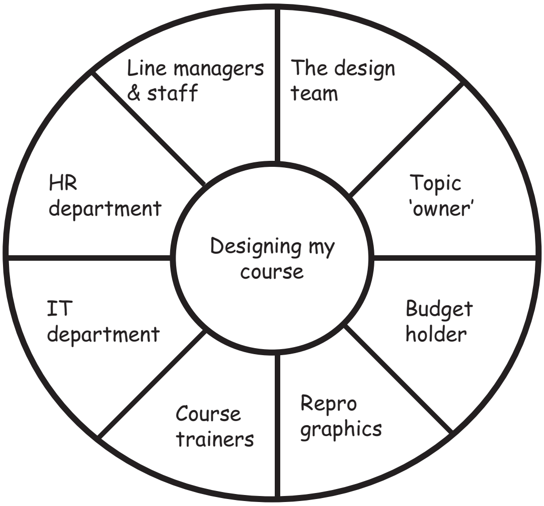


Figure 8.2 Sunflower part 2

Now add a further ring of 'petals' in which you'll write exactly what help or support you'll need, for example:

- Topic 'owner' – accurate advice and quick responses to 'sign offs'.
- Budget-holder – frequent updates, fight for the project and flexibility.
- The design team – commitment, creativity, enthusiasm, and time management.

- Line managers and staff – honest input on work processes and genuine feedback.
- HR department – up-to-date advice and quick responses to 'sign offs'.
- IT department – accurate advice and quick solutions to problems.
- Course trainers – honest input, open attitude to new approaches and creativity.
- Reprographics – timely, cost-effective, attractive and functional materials

By now your sunflower looks like this:

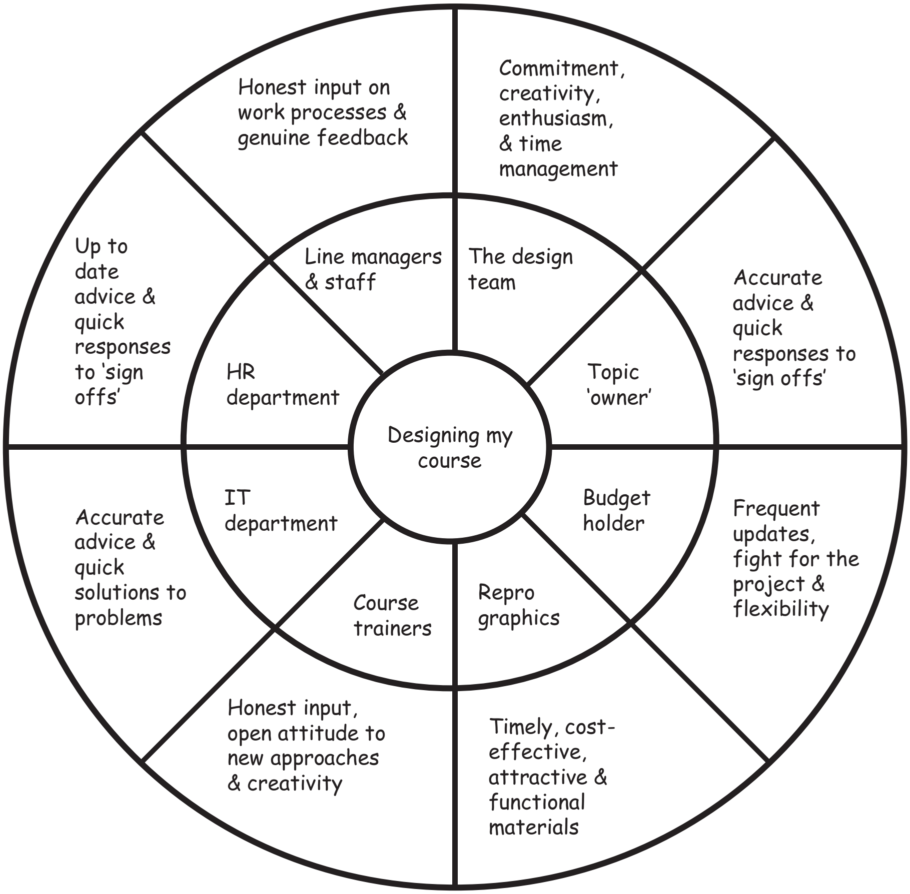


Figure 8.3 Sunflower part 3

So you can see how on one sheet of paper you can quickly develop a master plan for your design project. In many ways it's simply another form of mind mapping, with the ideas being collected on the petals. Now you've got the idea, why not use it to plan whose 'buy in' you need for your proposed course?

Template E: **Explore the learning options.**
Task E10: **People I need to influence.**
Duration: **20 minutes.**

6. Write your proposal

You now need the sponsor's authority to start designing the training intervention. Who you are, where you work, and the scale of the project will determine the scope and format of your proposal.

- If you're really lucky you may simply have to explain your proposal to the sponsor to gain their agreement, perhaps having e-mailed an outline in advance.
- At the next level you may have to produce a formal proposal, which you explain to the key stakeholders during an informal meeting.
- The most demanding requirement is to produce a formal proposal, accompanied by a presentation, which you deliver to a group of decision makers.

Many are called – few are chosen!

If you have to produce a formal proposal, don't regard it as 'a waste of time' or something to be dashed off quickly while you focus on 'more important things'. Remember that your proposal may be one of many presented to busy senior managers and, if your proposal doesn't grab them at the first pass, it will probably fail. And that's it. Your only chance will be gone! So spend time, spread over several days, writing a proposal which is not only complete and correct, but which also grabs their attention right at the start and makes them want to read to the end. Write a proposal which:

- highlights the benefits to the business and the delegates;
- is structured so that the reader can quickly reach the parts which interest them;

- has that optimum balance between 'completeness' and 'conciseness';
- is written in Plain English – clear and to the point;
- has an 'assumptive close' embedded in it – instead of saying: 'if the proposal is approved…' write instead: 'once the proposal is approved…';
- offers clear, costed options to carry out the design work which will deliver the required changes in business performance;
- leaves the reader feeling compelled to go ahead with the proposal.

Your proposal

We'd suggest that you look through the following checklist, which you can 'flesh out' with the appropriate details, if you have to produce a formal proposal. To ensure consistency we've used the same broad headings for the proposal as the chapter on learning needs analysis. Your proposal could include these main sections.

'Topping'

- Distribution list – who it's going to, divided into two categories:
  - Action addresses – who need to take action.
  - Information addresses – who only need to be aware of it.
- Contents list.
- Executive summary – which gives a brief overview of the proposal. Write this last of all.

Section 1 – Background to the problem/ requirement

- The problem/requirement and what has caused it.
- The impact to the business.
- Who initiated the project?
- Terms of reference.
- Membership of the training design project team.
- Outline the learning needs analysis process.
- Internal and external drivers for change.
- Other linked initiatives.

Section 2 – Summary of details of the problem/ requirement

- Who is involved?
- What type of performance is required?
- Performance gaps identified.
- Issues identified for which training will not be the solution.
- Where and when learning / training needs to be delivered.
- Corporate, departmental or individual issues.

Section 3 – Options

- Options with relative advantages / merits / disadvantages and associated through-life costs [where appropriate].
- Suggested optimum solutions to deliver requirement within constraints.
- Trainer-led, self-study or a combination?
- Framework design strategy / intervention design.
- How learning / effectiveness of programme will be evaluated.
- Suggestions on how the operational impact of the programme will be measured by the organization / business.

The programme in detail

- Who is it aimed at? Grade / location / function?
- Proposed duration, number of events, maximum participants, etc.
- Total population to be trained.
- Sites and locations.
- Give an overview of the content and flow.
- Mention specific models or concepts.
- Delivery method – trainer-led / self-study / blend.

Design process

- Design team members.
- Outline how the design will be done.
- Agree the 'sign off' process.
- Discuss compliance with brands, logos or other procedures.
- Propose key milestones.

Resources

- Budgets.
- Buy-in or design in-house?
- IT implications.
- Other resources, eg other training materials or equipment.

Timings

- Schedule for design work.
- Pilot course – when / where / who?
- Review and modification process.

Roll-out

- Train the trainers.
- Launch strategy.
- Communication and publicity.
- Venue requirements.

Evaluation

- Return on investment for the business
  - Short term – end of course.
  - Medium term – changes in behaviour.
  - Longer term – business success.

Section 4 – Way forward/next steps

- Say why this approach is the best.
- Outline the key benefits for the business.
- Propose an outline action plan – *who* will do *what* and by *when*.
- Say what is required by the designer / design team from the sponsor in order to move forward.
- Itemize the next steps to be taken to mobilize design resources, leading to developing and testing the pilot design.
- Quote a specific date by which approval will be assumed unless objections are raised.

'Tailing'

Signature, Job Title and Department
Date
Contact details
Supporting documents

- Attach any supporting documents or information the reader may find interesting.

Please consider the format you will use for your proposal, and put together the initial draft.

Template E: **Explore the learning options.**
Task E11: **Write your proposal.**
Duration: **1–2 hours.**

7. 'Sign off' by the project sponsor

The final action in Step 'E' is to consult your sponsor and get their 'sign off' for the work done so far. Do they agree with the proposal, and, if not, what further work do they require?

Don't proceed until you have his/her formal agreement, preferably in writing, or you may be risking wasting your time. It may be that circumstances have changed, or that the sponsor knows something you don't, which may have an impact on your course. In the initial design meeting you will have agreed how these milestones will be managed – will they be an exchange of e-mails, an informal meeting or a more formal presentation? Whatever you've agreed, present your case well but don't start on any further work until you get the go-ahead.

Template E: **Explore the learning options.**
Task E12: **Sponsor's formal 'sign off'.**
Duration: **10 minutes.**

9

Be a STAR designer

1. Step S of the DESIGN model
2. Open a new template
3. Follow the STAR
4. ‘S’ is for Stimulate interest
5. ‘T’ is for Transfer ideas or concepts
6. Techniques for transferring ideas or concepts
7. ‘A’ is for Apply the learning
8. Techniques for applying the learning
9. ‘R’ is for Review what’s changed.

1. Step S of the DESIGN model

You are now ready to embark on Step S of the DESIGN model, when you structure your training programme.

Purpose

- Design the detailed structure of the training.
- Gain sponsor’s agreement to the final design.

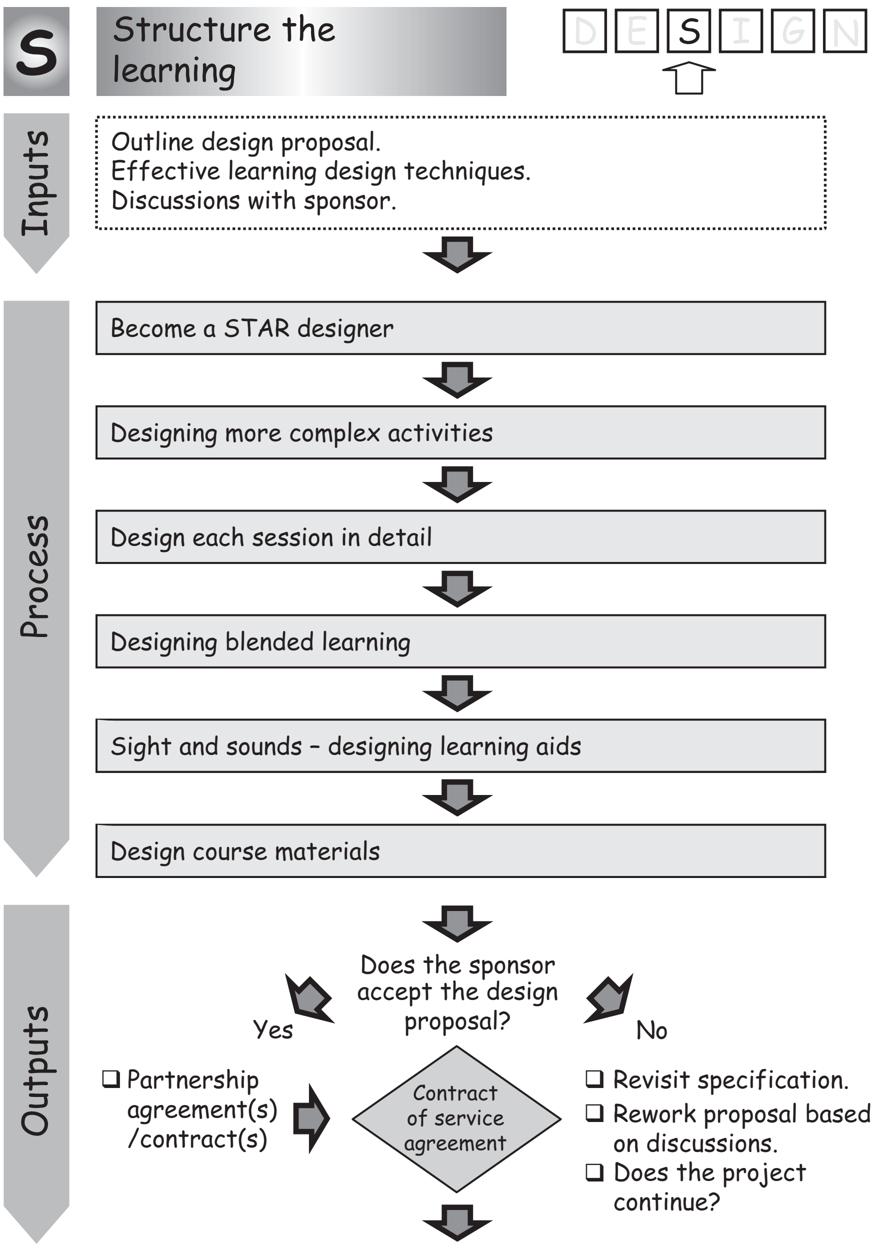


Figure 9.1 Structure the learning

Inputs

- Outline design proposal.
- Effective learning design techniques.
- Discussions with sponsor.

Action

- Consider how best to deliver each session.
- Develop any workshop or team activities.
- Are there any sessions requiring language or cultural modification?
- Who will deliver the programme – local or external trainers?
- Finalize the draft timetable.
- Review proposal with sponsor.
- Identify design phase resources and life-cycle management.

Outputs

- Final design.

Decision point

Is the final design acceptable?
If 'yes':

- Develop partnership agreement[s] and/or contract[s].
- Draft contract or service agreement.

If 'no':

- Go back to specification.
- Rework proposal based on discussions.
- Does the project continue?

2. Open a new template

If you are using the book to build up a complete design you will need to open a new template.

- You can access the online materials using www.koganpage.com/resources/books/TrainingDesignManual and the password is TD1917.

- Find 'Template S – Structure the learning'.
- Copy it to your drive and rename it.
- For example, if you're developing a recruitment and selection course you might rename it: 'Rec & Sel. Template S – Structure the learning'.
- Keep the file open and, as we come to appropriate tasks in the following chapters, simply enter your ideas in the appropriate sections.

3. Follow the STAR

You now know the overall flow for your course, how long each session might last, and when they start and finish, so now you can design each session in detail. In this chapter we'll introduce the STAR design model, and in subsequent chapters we'll look at designing workshop and team activities.

4. 'S' is for Stimulate interest

The first step of STAR stresses the importance of stimulating interest. If people aren't interested in learning then no matter how good the design and the materials are, it's unlikely that they'll get any real benefit from the training. So strive to stimulate interest from the initial contact, arriving at the venue, and then throughout each and every session. Here are some things you can design-in to arouse and keep your delegates interested.

Interesting joining instructions

Take a critical look at your current course joining instructions and, be honest, do they excite you? If you received them, would they really motivate you to attend one of your courses? If not – what can you do about it? Consider this example which I used for an Accelerated Learning course. The document is printed on both sides of a sheet of A3 paper, which is then folded in a clever way so that, as the delegate unfolds it, gradually more detail about the course is revealed.

The key points of this example are:

- It's addressed personally to delegates, so making them feel special at the initial contact.
- The way it's folded is intriguing and arouses interest.

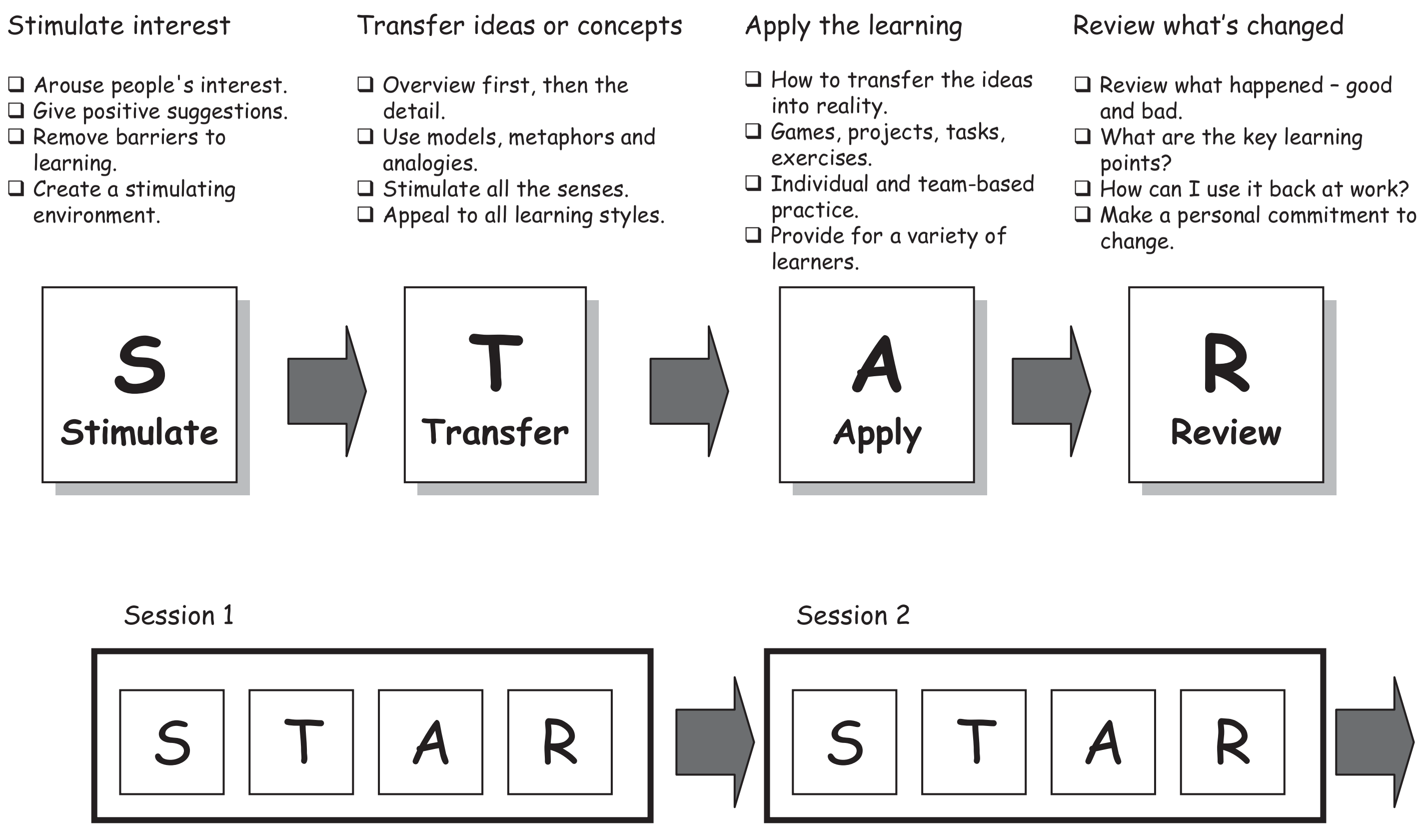


Figure 9.2 STAR training design

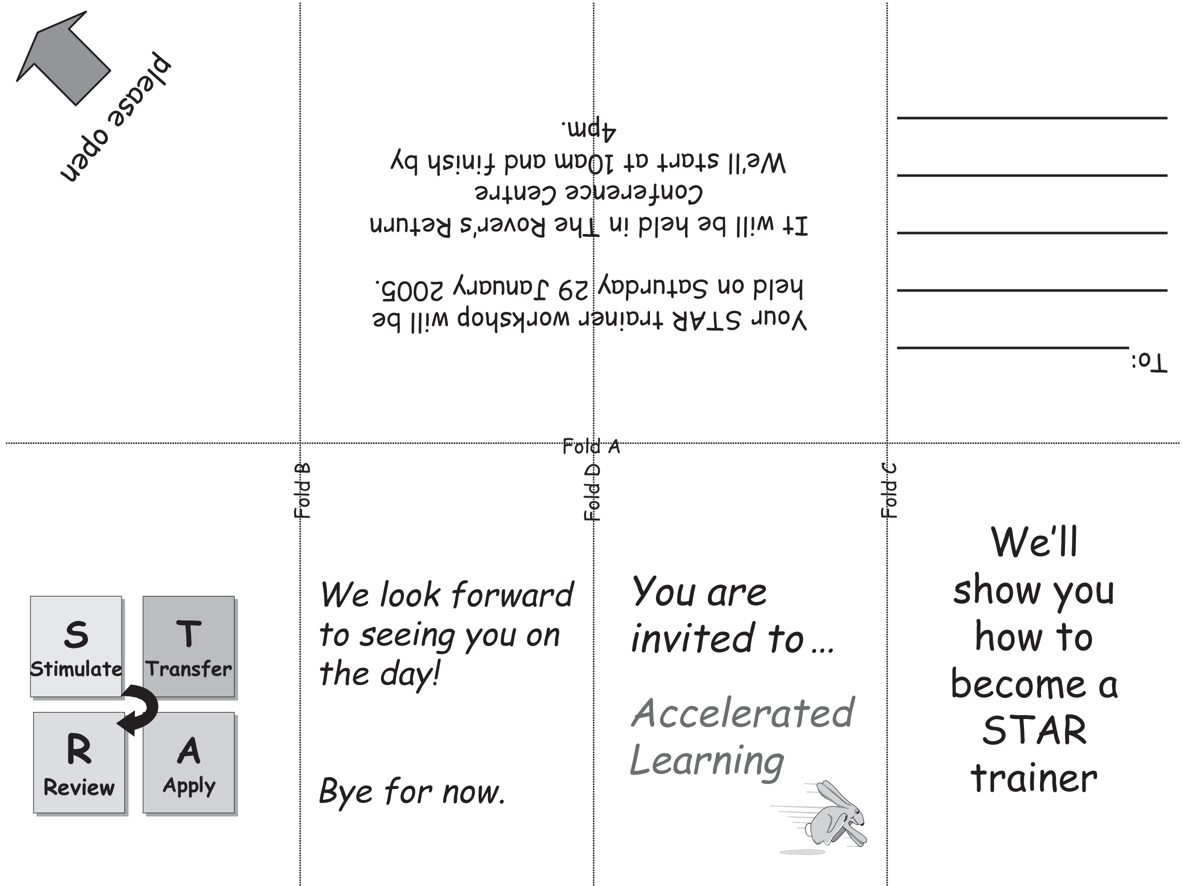


Figure 9.3 Example of course joining instructions (continued overleaf)

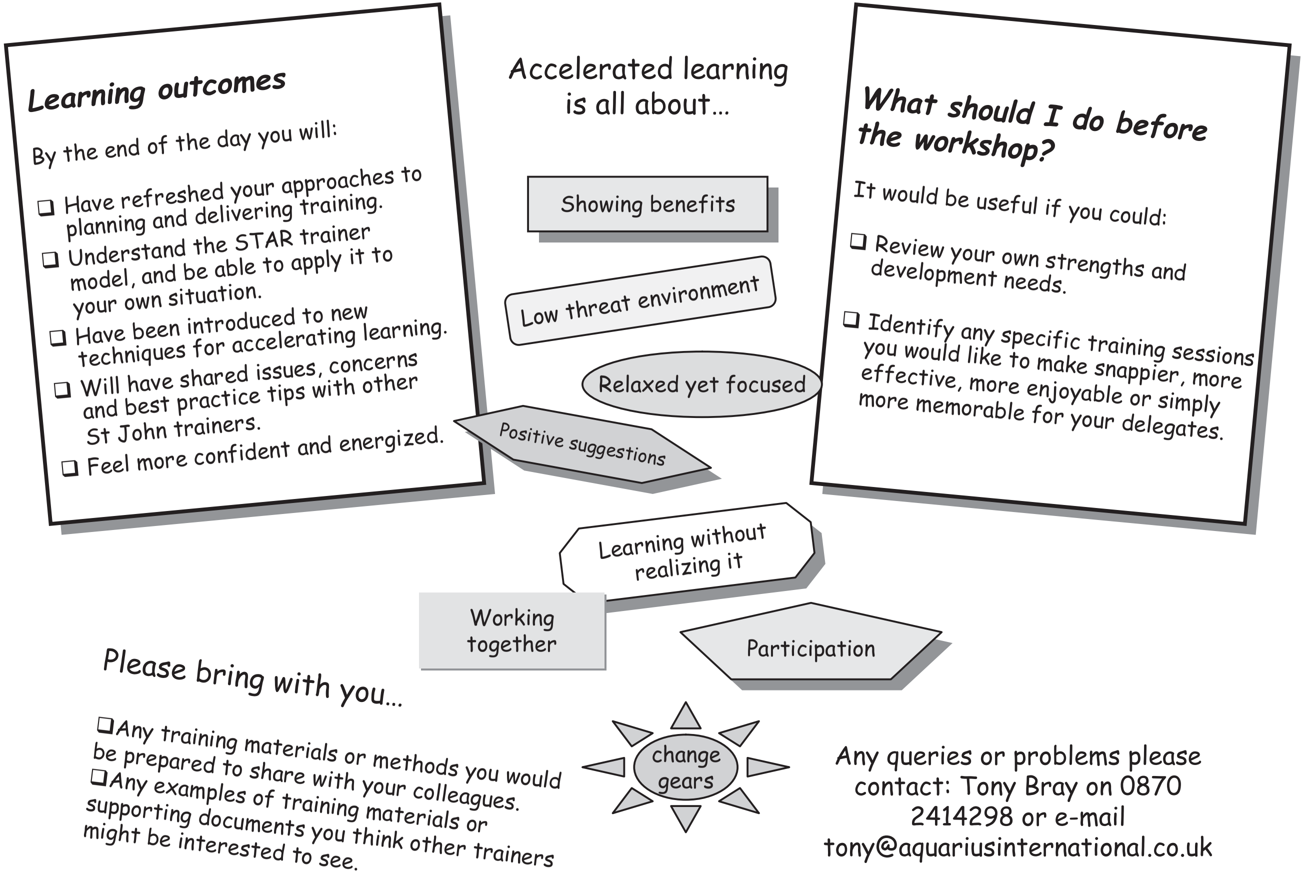


Figure 9.3 (continued)

- Printed in colour it says the course will be different – not boring 'business as usual'.
- It lists specific learning outcomes, at least one of which is likely to appeal to the delegate.
- The informal 'overview' of Accelerated Learning looks different and interesting.
- It invites the delegate to do something constructive prior to attending.
- It says whom to contact for more information.
- It gives clear directions about where and when the course will be held, and what to bring along.

Pre-course work

Pre-course work – can you cover some of the underlying theory, or challenge delegates' pre-existing knowledge of the topic? Don't go overboard with this as you may cross that fragile line where people decide '*It's too much hassle!*' and either don't finish it or, worse still, don't even start!

If you do use pre-course work, refer to it sometime during the course, preferably earlier than later, and weave it into the whole programme. But don't expect that everyone will have completed it. In a typical group of, say, ten delegates, one or two will have done it in full, six to eight will either have done most of it, or all of it but some time ago… and one or two will have done very little!

Personal contact

If possible, contact each delegate personally before the course – it doesn't take long but will have a huge impact. Don't send an e-mail – talk to them just like people used to – remember? Ask about issues or concerns they may have, and discuss their personal goals for the course.

Like going to the dentist?

I have always hated going to the dentist. I can remember sitting in the chair on one occasion, white-knuckled hands gripping the chair, dreading what would happen next – and I suddenly became aware of the dentist and his assistant chatting about the most mundane things. What they did at the weekend, where they were going on holiday, how the new car was running, etc.

They seemed to be quite unaware of the terror I was feeling – then I suddenly thought: 'How many people arrive for training courses feeling just like I do now?' And I would be as unaware of their sense of terror as the dentist is. Because I feel comfortable and at ease in a training room doesn't mean that my delegates feel the same. So from that day onwards I resolved to put more energy into making people arriving for courses feel more relaxed and at ease.

Create a stimulating environment

When your delegates first enter the venue, what does it look, sound, smell and feel like? First of all, can they even identify the right room easily – is there a colourful, welcoming sign on the door? Then as people come in, what greets them? Encourage trainers to 'meet and greet' delegates personally as they enter – make them feel special:

- They should shake the delegate's hand, smile and make that first all-important eye contact. If they called them before the course, remind the trainer to refer to what they discussed and bring it into the conversation. Have they been on holiday? Started a new job? Had some life-changing experience, like getting married, becoming a parent or getting divorced?
- Try to put yourself in your delegates' shoes as they enter the room – what will they experience? What will they be feeling? Try to stimulate as many of their senses as you can.
- Ensure that the room looks welcoming and promises an interesting experience – table 'dressing' and room layout all contribute.
- Have colourful posters or charts on the wall, which change the feel of the average training or conference room.
- Provide interesting games or puzzles on the tables, which suggest that the course may be fun, and which get people talking and 'break the ice'.
- Play some appropriate music to take away that 'empty' feeling about a quiet room.
- If the air in the room is a little 'stale', light a joss stick to bring in a different aroma, but be careful that you don't site it under a smoke alarm, or you'll be out of the room in minutes!
- Arrange the furniture so that people can easily talk with each other – it also subtly suggests that they are more important than the trainer.

Use a course map

Draw a diagram of the course like a map, with the key topics shown as stops along the way. Then draw a bus on a Post-it Note, which represents the delegates. At the start of the course position the bus at the 'welcome' point and, as you go through the course, move the bus to show progress along the journey.

Any plans for 'special effects'?

If you're asked to design a course or workshop to create a high impact you may consider employing 'special effects', which could highlight specific features, achievements or underlying principles. Here are some examples.

I helped to stage a conference for the IT function of a major international company, which was designed to get the IT specialists thinking beyond the technical aspect of their role, and see the contribution they made to the overall business. I suggested two ideas, one of which was adopted and the other rejected:

- We set up an electronic counter in the main conference room which showed the number of products the company made worldwide, second by second. Switched on when the conference opened, and counting throughout the event, it was like a heart-beat, giving the delegates a visible and constant reminder of what the business was about.
- I suggested constructing across the entrance into the conference centre a huge computer screen, complete with mock keyboard on the floor. As delegates arrived on the first morning they would smash through the screen and go through into the meeting hall to conduct the business. This would symbolize going through the technology to focus on the real business issues. This proposal was not adopted because, although the idea was in tune with the overall theme, the costs far outweighed the impact, which would have lasted for a very short time.

Please take a few minutes to consider what you might do to stimulate interest, and record the ideas in Template S.

Template S: **Structure the learning.**
Task S1: **Stimulate interest.**
Duration: **20 minutes.**

5. 'T' is for Transfer ideas or concepts

Once delegates are stimulated to learn, you're ready to move into the 'T' of STAR, when you transfer the ideas or concepts from your brain to theirs. First let's explore the overarching principles before looking at some specific techniques. If you want extra ideas, surf the net and search for 'accelerated learning' – you'll find masses of sites!

Overview first, then the detail

Show people the wider perspective before you go into detail – that way people can see how the pieces fit together, and the flow from one item to another.

Give positive suggestions

Delegates must feel positive about the learning experience they're about to undertake, and that they'll develop both confidence and competence. Many trainers seem to delight in telling delegates how difficult the subject is, or how few will manage to pass!

Use models, metaphors, stories and analogies

Constantly be searching for different ways to enliven familiar concepts or processes, especially those familiar, traditional or 'boring' topics.

Stimulate all the senses

It takes little imagination to use the two most common senses – hearing and seeing. But how can you build in ways for delegates to use their sense of touch – for example handling materials, samples, models or parts of the 'real thing'? Can you find opportunities to use the sense of smell, especially with products or materials? Involving the sense of taste is a little more challenging – but it still can be done. Especially if you can also use blindfolds as well!

Appeal to all learning styles

Balance the active pace with time for reflection, and balance the theory with the practical.

Reinvent approaches for familiar topics

There's no such thing as a boring subject – only boring designers or trainers! So always be on the lookout for new ways to put ideas across. For example, to illustrate the power of body language I show delegates a short extract from a ballet, and ask them to summarize what they have learnt about the characters. You'll be amazed at what people can deduce from the dance, the gestures and the body language. And all without a word being spoken! Bringing some wonderful music into the training room is an added bonus!

Change the processing method

Vary the way people do things – interleave trainer-led discussions with team exercises, paired discussions, solo work and challenges. Encourage delegates to constantly work with new people so that they experience different ideas and approaches.

Change gears

Ensure that delegates change their work pattern every 30 minutes or so. To keep them interested, vary the task, the focus, the grouping, or whatever.

Learning without realizing it

Whenever possible, arrange your design so that delegates learn without realizing it.

The atmosphere

Strike the ideal balance between being relaxed and focused, although much of the success for this will depend on the trainer running the programme. This is where the appropriate use of music can be so helpful – upbeat tempo when there's some energetic teamwork, or relaxing, reflective music for those quieter moments.

Working together

Design courses which encourage people to work together. Adults tend to work alone, which prevents them from benefiting from others' ideas and inspiration.

Make sure it's fun!

People will learn much more if they're enjoying themselves. To be effective, training doesn't have to serious, boring, intimidating, intense, etc. So build in fun and enjoyable tasks or activities.

Use humour carefully!

Don't tell jokes – for two reasons. First, most jokes rely on making fun of people in some grouping or other. And you may just have one of them in your audience! Second, jokes require good timing to deliver the punchline and, if you're nervous, you'll screw it up!

But have humour and direct it towards yourself – that way you can be sure that it won't offend anyone.

Participation

Overall, do everything you can to get people engaged with the course and the content physically, mentally, emotionally and spiritually. Make sure they see the course as something that is done with them and not something that's done to them!

6. Techniques for transferring ideas or concepts

T1. Presentation

A straightforward way of transferring ideas is to deliver them in a focused presentation.

T2. Demonstration

The trainer demonstrates the skill or technique in action, before asking delegates to perform it themselves.

T3. Follow me

A variation on the traditional demonstration is to progressively transfer responsibility to the delegates as they build confidence. In the Army, weapon training is done using this very effective approach. It looks like this:

- Demonstrate the skill at normal speed to show what standard of performance is expected. To the uninitiated it all looks like a blur!

- The instructor now does it again slowly to show the individual steps in more detail.
- The recruit now attempts each step in turn, with the instructor giving appropriate feedback, and sharing tricks of the trade.
- Finally the recruit does the whole process alone, slowly at first, then building up speed.

T4. Visualization

Visualization is a powerful way to implant apparently random information. If you don't believe this works, can you just take a few minutes to try it yourself? You can? Good.

Before we start we'll ask you to do something we'll recommend later in this chapter, which is to undertake a pre-test to assess your current level of knowledge on the topic.

Ready? On a sheet of paper please write down the planets in our solar system in order from the Sun.

Done that? Then you're ready to start the visualization journey:

- First of all, imagine that hanging from the ceiling is the base of a huge thermometer and, as you know, in the bulb of a thermometer there is **Mercury**. That's our first planet.
- The bulb suddenly bursts, spewing globules of mercury around. Imagine that some of the mercury is caught by the most beautiful woman you can imagine. Try to visualize her in as much detail as you can. Her name, of course, is **Venus.** So now we have Mercury and Venus.
- She throws some of this mercury over towards the garden where it lands with a loud thump as it hits the **Earth.** So that is our third planet. We now have Mercury, Venus and Earth.
- As the mercury lands it throws up a shower of earth and it rattles against the fence which you share with your neighbour. Imagine the violent drumming noise. You suddenly see your neighbour's bright-red face pop over the fence shouting at you. The planet with the red face? **Mars.** So we have got so far Mercury, Venus, Earth and Mars.
- Mars is making such a noise that he upsets the big fellow down the road, and he comes along to sort it out. And the biggest planet in the solar system is **Jupiter.**
- As Jupiter approaches, you see that he is wearing a white tee shirt with a brilliant sun burning from the chest. And of course **SUN** is short for **Saturn, Uranus and Neptune**.

- And then you notice a small dog yapping around his feet. And the little dog is called? **Pluto**.

So now we have Mercury, Venus, Earth, Mars, Jupiter, Saturn, Uranus and Neptune. And if you've really done that visualization well you'll always win a pint from friends when that question inevitably comes up in the pub quiz! Finally, go back to your sheet of paper and check how many you got right in the pre-test.

Visualization works extremely well for a wide range of applications – of course, the trainer really needs to believe it so that he or she can embroider the story with all sorts of details and realism.

T5. Mnemonics

Mnemonics are a powerful way of remembering abstract or random information. Why not build into the design a session which asks the delegates to create their own mnemonic? Recognize these mnemonics?

- Most Volcanoes Erupt Mulberry Jam Sandwiches Under Normal Pressure
- Every Good Boy Deserves Food
- FACE
- Any old Red Port Left?
- Take Vera to the Matinee and Doris to the Concert
- HOMES.

In case you're stuck they are:

- The order of the planets in our solar system.
- Musical notation EGBDF and FACE.
- The red light shows on the left [port] side of a ship or aircraft.
- The last one's for the navigation buffs – apply Variation to a True heading to convert it to Magnetic, and apply Deviation to convert Magnetic to a Compass heading.
- An easy way to remember the Great Lakes – Huron, Ontario, Michigan, Erie and Superior [that's another pub quiz question sorted].

T6. Acting out a system

- Assign people roles to play in a process or system and have them act out the whole process.
- This can be useful for teaching people concepts like handling a 999 call.

T7. Alternative presentations

Suggest that the trainer delivers a presentation as:

- a talk show;
- a news programme;
- a press conference [with learners planted with questions];
- a story hour;
- a Bingo game [with learners having to complete information on Bingo cards as new learning material is presented];
- a demonstration with people as props;
- a one-person skit, with the presenter depicting the situation he/she is in.

T8. Articulation

- Stop a presentation periodically and have partners talk with each other about the presentation, what it means to them, and how they can apply it in their life and work.

T9. Collaborative pre-test

- Give people 'the final exam' right at the start of the course/session.
- Ask them to collaborate with each other to see how much they already know or can figure out using the available reference material ie reference guide and current knowledge.

T10. Flowcharts/diagrams/drawings

- Give delegates a text on an unfamiliar topic, eg management of a disciplinary case.
- Ask them to study the reference guide in pairs and then to produce a flow chart or diagram that summarizes the process described in the text.

T11. Interrogating the text

- Give delegates an unfamiliar piece of text from the reference guide.
- In pairs or small groups they are asked to formulate important questions that the text should be able to answer, or that they hope the text will answer.

- Read the text, highlighting key points. Discuss the key points and agree answers to the questions formulated.

T12. Key points

- Put delegates in groups and give them some course materials.
- Ask them to read the text alone for a few minutes with an eye on the next task.
- The group identifies, say, five key points made by the text. [It helps if the number of key points is the same as the number of groups.]
- The trainer then asks each group to give one key point [that has not already been mentioned by another group].

T13. Musical questions

- Give learners each a card. Ask them to print on the card a question relating to the material just covered and not to sign their name.
- While music plays, ask them to keep passing the question cards to the right until the music stops.
- Then give them a set amount of time to research the question card they are holding at that point, using any person or document in the room as resource.
- Then debrief.

T14. Treasure hunt

- Put people in teams.
- Give each team the same list of 10 or 20 items of information to gather in a set amount of time, using resources both inside and outside the training room.
- Want to add an extra bit of fun? Give them Polaroid cameras and make it a 'Photo Treasure Hunt'.

T15. Snowball

- Instead of 'telling', the trainer asks a question that leads to what the delegates need to learn.
- Each individual then writes down their thoughts without reference to others. Delegates then share what they have written in pairs or threes. Optionally the pairs or threes combine to create larger groups, which again compare their answers, and then agree a group answer.

- The trainer asks each group in turn for one idea, writes the ideas on the flipchart, perhaps adding some comments.

T16. Stump your partner

- Ask partners to ask each other five questions about what was just presented.

T17. Learning by guided discovery

- Ask 'diagnostic' questions, and use any 'wrong' answers given to explore and correct misunderstandings.
- Try to use thought-provoking tasks and questions, rather than simple recall, as these require more thought and processing.

T18. Video/DVD

Using video/DVD can be useful provided the content is really 'on target' and short and to the point. From experience, video is a passive learning technique as delegates quickly start 'switching off', so use it in short bursts to demonstrate specific points, perhaps involving delegates with relevant activities where appropriate.

T19. Whole body learning

Get delegates to use their bodies in the learning process. For example, if you're trying to illustrate one of the many models which use two axes to describe behaviours, such as 'social styles':

- Ask delegates to imagine a line on the floor – one end is 'task focused' and the other 'people focused'.
- Ask them to position themselves where they think they normally operate.
- Now introduce a second axis at right angles to the first – to the left go people who 'ask' and to the right go people who 'tell'.
- Keeping their original positions along the first axis, ask delegates to move left or right by an appropriate amount to show how they influence people.
- Once the movement stops, ask everyone to see where others are, then open a discussion on the four different styles represented.

Before moving on to the next section it's worth taking a few minutes to review the last section and decide which approaches you could use.

Template S: **Structure the learning.**
Task S2: **Transfer the learning.**
Duration: **30 minutes.**

7. 'A' is for Apply the learning

It's one thing for delegates to know something – but quite different for them to know how to apply it. This stage of STAR is so important and your design needs to give delegates every opportunity to practise the skills, techniques or approaches in a realistic setting.

Show me

Ask people to demonstrate their capability. Using the earlier example of the administrator, the trainer could ask each delegate to 'carry out the task consistently error-free in four minutes or less'. As a young soldier, after a weapon training class we would, for example, be asked to 'strip the weapon' and we would be given focused and immediate feedback if we got it wrong!

Simulations

Use games, projects, tasks or exercises which require delegates to show their mastery of the skills or techniques.

Collaborative working

Incorporate individual with team-based practice. Most of the things we do in this modern world require us to work with others to achieve our goals – there's very little we can do by ourselves. So give people the chance to show how they interact with others while applying their newly developed skills.

8. Techniques for applying the learning

A1. Cross-training

- Form delegates into teams who become 'experts' on their specific topic [task A, task B and task C].

- After preparation time the delegates reform themselves into new teams, so each of the new groups has at least one of the 'experts' [an A, a B and a C].
- Each 'expert' now trains the others on their specialist topic.

A2. Role play or skill practice

Please see the next chapter for more detail.

A3. Team discussion with feedback

- Delegates form teams and discuss how they will apply the ideas or skills back at work.
- Ask each team to report back on a different aspect so the team presentations are varied.

A4. Correct the errors

- Delegates work in pairs.
- One introduces an error into a system and their partner needs to discover and correct it.
- Change roles and repeat the process, the 'errors' becoming more challenging.

A5. Hat draw

- Ask everyone to put a question in a hat.
- Then everyone picks one out and has five minutes to research the answer for the rest of the group.

A6. Art contest

- Have partners or teams create artwork to review learning material, colourful pictogram murals, three-dimensional displays, etc.

A7. Buzz groups

- Students work in pairs or small groups to answer a question using common sense, experience, and prior learning.
- Students can all have the same questions, or can be given different questions on the same topic.

- This group discussion can last for less than a minute or for 20 minutes.

A8. Concentration

- Prepare a set of cards, with a 'hot' topic on each one.
- Put people in pairs. Give each pair the deck of cards, lay out the cards face down, then students play 'fish' and discuss the issues presented.
- You can stipulate one, two or more cards as the learning progresses.

A9. Talk me through it

- Working in teams, delegates construct a model of a process, eg a sales interview, while talking aloud about what they are doing, why, and how everything works.
- [A facilitator could keep asking questions to draw them out while this is going on.]

A10. Create materials

- Working in teams, delegates create learning materials for each other.
- This could include job aids, review games, learning exercises, models to manipulate, research projects, problem-solving exercises.

A11. Peer teaching and review

- When training a hands-on process, put people in pairs, one partner being A, the other B.
- Ask A to perform a newly learnt process for B, as if B has never heard it before and is sight impaired.
- A has to explain every step of the process while doing it, or shout instructions to a pair trapped in a lift.

A12. Twenty questions

- Before a presentation, put people in pairs.
- Ask everyone to prepare a 20-question oral [or written] examination for their partners based on what they are about to hear.
- At the end of the presentation, have partners administer their tests.

A13. Problem solving exercise

- At the start of the session put people in teams.
- Give them a problem to solve relative to the learning material, eg causes of stress at work.
- Ask them to use any resource they have, inside and outside the training room, for solving it.

A14. Thought experiment [or empathy]

- Students are asked to imagine themselves in a given situation – then ask them questions about the situation.
- For example, discussing poor performance during an appraisal interview might prompt questions such as 'how do you think the other person is feeling?' or 'what would your reaction be if he said XXXXX to you?'.

A15. Cooperative learning

- The trainer prepares thought-provoking questions on the key topics in the course.
- Teams are asked to use the course materials to answer these questions.
- The answer to the question[s] should not appear in one place in the course materials. Students should need to read, understand, and then think about the text to answer the question.
- This requires that students construct their own understanding and don't just repeat the text back to you.

A16. Question/answer exercise

- During a presentation, ask everyone to write down three questions about what's being covered.
- Then ask them to mingle with other delegates until they find the answers to their questions.

A17. Quiz games

- Use games based on ones that the learners are familiar with such as University Challenge or Trivial Pursuit.

- Make sure that the teams are balanced and that no member of the team is ever left on their own to answer a question.

A18. Making a video

- Give delegates the basic equipment [camera, tripod and tape] and ask them to make a short video which summarizes the key points of what they've learnt, or how they will apply it back in the workplace.
- They will need about 1 hour to plan it, 30 minutes to shoot it, and 30 minutes to review and discuss it.

A19. Walk about

This method is especially good for courses like Health and Safety. Having gone through the theory of, for example, safety hazards:

- Pair your delegates up.
- Ask them to explore the training venue and look for safety hazards.
- Then hold a group debrief.
- You'll be horrified at what they've found!

Before moving on to the next section it's worth taking a few minutes to review the last section and decide which approaches you could find useful. As you've probably realized, many of the techniques we've included in Apply the learning can also be used to Transfer ideas or concepts, and vice versa. Remember – these are 'tools' not 'rules'!

Template S: **Structure the learning.**
Task S3: **Apply the learning.**
Duration: **30 minutes.**

9. 'R' is for Review what's changed

We mentioned earlier that any 'quality' programme has three main components:

- Say what you do.
- Do what you say.
- Prove it.

So having 'done what you said you were going to do' the final step is to prove that your training or learning has made a sustained change to business performance. Are people now able to do what we wanted them to do? Evaluating training is one of those topics which is debated endlessly, and there are a variety of specific measures you can put in place to deliver some meaningful results. Let's look at some examples:

- You can measure changes to skills or knowledge after completing parts of the learning.
- At the next level you can measure what changes an individual has achieved having completed the learning.
- You can easily measure delegates' reactions to the learning.
- You can monitor what sustained changes delegates display some time after the learning.
- Taking a wider view, it's valuable to monitor changes to the business overall, which have resulted from the training initiative.
- If possible, evaluate the overall financial impact of the training, so that the business can quantify the full benefits of training.

Measure changes during the learning

It is surprisingly easy to measure changes during the programme to see what has 'stuck' from specific sessions. Many of the techniques in the 'Apply the learning' section will enable the trainer to see progress, but to get a more consistent measure it's helpful to build in progress tests or assessments as you go through.

For example, let's consider a training programme which helps delegates to improve their ability to observe, record and transfer data accurately. You can incorporate regular assessments which record people's abilities before and after each of the main sessions. That way delegates can see for themselves how much their skills are changing during the course.

Delegates complete short, focused assessments which take about 10 minutes. They then exchange their answers with their neighbour and score their partner's answers using the 'solutions' given in the back of the manual. The trainer then holds a brief discussion to bring out common themes or 'sticking points'.

This approach is also used in e-learning designs to monitor progress throughout the course so that learners can be redirected if they seem to be struggling with a particular section.

Measure changes following the learning

Proving the immediate benefit of any form of training is a great way to deflect any complaints about the time or money that training is costing the business. To show tangible benefits you need to measure delegates' ability both before and after the training intervention.

The 'before' assessment is best done right at the start of the course as that way you can be sure that everyone is doing it under the same conditions. In the programme I just mentioned, delegates are given a pre-course assessment in the first hour of the course, which takes about 15 minutes to complete. This assessment tests them in all the key areas to be covered by the course and provides a reliable 'pre-course' measure of ability.

The trainer collects the assessments and scores them. Once the results have been summarized for the whole course, they are discussed with the delegates to show their initial competence levels. Grossing up the percentage errors found in the 'Pre-course' assessments, the trainer can show the overall effect of these errors when applied across the whole working day for one individual, then accumulated for all delegates on the course. The individual assessments are returned to delegates privately for people to see where their own competence level fits in with the group performance.

The course ends with a 'Post-course assessment' which tests delegates in the same key areas covered by the 'Pre-course' equivalent. The trainer scores this assessment after the course and returns the results to the delegates individually. That way the trainer can assess the overall change in performance which has resulted from attending the course and report the summarized findings back to the sponsor.

This approach of 'before' and 'after' assessment is also used with e-learning to show the learner how much they have learnt. The 'before' assessment also has another important function as it helps the learner to steer their way through the course materials.

- It helps them identify topics or sections they are very confident or familiar with, which they may decide to bypass completely.
- It shows sections they may have knowledge of but need refreshing.
- It identifies sections they may be novices at and which may require more detailed study.

So this navigational aspect of the 'pre-course' assessment is an important element of the e-learning design. Once the delegates complete the 'Post-course' assessment the learning system can then instantly show the individual how their knowledge or skill level has changed since starting the programme.

Measure delegates' reactions to the learning

Many people scoff at the traditional end-of-course questionnaire, and some trainers refer to them as the 'happy sheets'. I find them very useful and many of the fundamental changes to my working practices have come from comments delegates have made on these questionnaires. To make the questionnaires effective we would suggest a blend of:

- Direct questions, which focus on specific aspects of the course. Use a scale for delegates to record their degree of satisfaction, ensuring that there isn't a mid-way mark for the fence-sitter to hop onto.
- Open questions, which invite delegates to record their own views on what happened and how they will benefit from it.

The following end-of-course questionnaire gives you a template which you may wish to modify for your own situation (Figure 9.4 overleaf).

Measuring sustained changes

The real challenge for any trainer is to be able to show that delegates continue to apply their learning months after the course took place, and that there have been irreversible changes in skills or behaviours. There are several approaches you can take, but, because they tend to be time consuming, they are often not done.

- Hold one-to-one discussions with delegates [and their line managers] to see what sustained changes are displayed three months after the learning took place. A switched-on line manager will have set specific objectives, reflecting the main elements of the course.
- Follow up by e-mail to see what longer-term impact the learning/training had, and ask the delegate to give examples of sustained changes.
- Ask delegates to copy their manager with the specific changes they commit to making at the end of the course. The manager replies to the HR director saying how they will support the individual.
- Three months after the course the HR director then contacts the line manager and asks for a progress report on the specific action points. This is what the action planning sheet looks like (Figure 9.5 overleaf).

Today there's so much pressure to get on with the next job that reviewing what's gone by is easily lost in the maelstrom. But it's worth doing if you can. If you can't monitor everyone, perhaps focus on a small number of 'critical' learning streams so you can at least be able to prove their worth.

Workshop evaluation

- ❑ Please take a few minutes to complete this evaluation form.
- ❑ Please comment as well as ticking the rating scale.
- ❑ All comments will be helpful to us and treated confidentially.

	Strongly disagree · Agree · Strongly agree
Please tick where you think appropriate	1 2 3 4 5 6 7 8 9 10
Workshop achieved stated objectives.	1 2 3 4 5 6 7 8 9 10
Topics well organized and easy to follow.	1 2 3 4 5 6 7 8 9 10
The pace was too slow/just right/too fast.	slow/just right/fast
All sessions of the workshop were relevant/useful.	1 2 3 4 5 6 7 8 9 10
Topics creatively presented and developed.	1 2 3 4 5 6 7 8 9 10
Right amount of individual/group participation.	1 2 3 4 5 6 7 8 9 10
Will help me improve my job performance.	1 2 3 4 5 6 7 8 9 10

please turn over ➡

Workshop evaluation

1. Which sessions were particularly useful?

2. Which sessions did you find least useful?

3. Are there any topics you think should be included?

4. Are there any sessions you think should be dropped?

5. How will you describe the workshop to your friends this weekend?

Workshop:	Date:	Name[optional]

Thank you for your comments - they are most helpful.

Figure 9.4 End-of-course questionnaire

After this course I will …

Please review the course and identify a specific and measurable change in behaviour you intend to make.

❑ Please write the details here and be ready to share them with the other course members.
❑ After the course please discuss what you intend to do with your manager, who will be asked to return the tearoff slip at the bottom of the page.

I intend to …

Name: Date course attended: / /2009

To: AN Other
HR Director - Services

I confirm that one of my team, , attended the XXXXXXXXXX course on / /2009.

Following the course I have discussed his/her proposed action plan and I confirm it has been recorded on their personal objectives.

I intend to support my team member in the following way:

Signed: Date: / /2009

Figure 9.5 Action planning

Before we close this chapter, please review this final section on reviewing what's changed, and decide how you will assess the effectiveness of the training programme you're designing.

Template S: **Structure the learning.**
Task S4: **Review what's changed.**
Duration: **30 minutes.**

10

Designing more complex activities

1. Designing workshop sessions
2. Reversed workshop sessions
3. Team-based projects
4. Designing skill practice sessions
5. Using actors

An earlier chapter explored the STAR design model, and all the methods outlined there are fairly simple to implement and don't require much organization or planning. But you may be asked to design a more complex session, for example when:

- managers wish to disseminate a key message to a large number of staff;
- you wish to incorporate team-based activities into an event;
- you wish to develop interpersonal skills using role play;
- you decide to use actors.

1. Designing workshop sessions

Why use workshop sessions?

It may be essential to include workshop sessions to transfer ownership of the concepts being presented, or to make them 'come alive' for the delegates. But good workshop sessions don't just happen – they must be planned thoroughly and this section shows how. We have used a case study, based on an actual application in a factory, to illustrate the principles. There are many good reasons for using workshop sessions including:

- to build the delegates' commitment to an idea or proposal;
- to explore how an idea might be implemented or received;
- to change the pace and/or energy in an event;
- to strengthen relationships within or between groups;
- to have some fun or lighten the atmosphere in an otherwise 'heavy' session;
- to collect reactions or suggestions on a particular topic.

There are two main approaches to planning and managing workshop sessions: conventional sessions and reversed sessions. Each approach has its own merits, and you will have to decide which approach is most appropriate for you.

Conventional workshop sessions have these four steps:

Step One – Lead-in presentation.
Step Two – Briefing for the workshop.
Step Three – Workshop activity.
Step Four – Feedback session.

Case study – introduction

To illustrate this process we will show how this model was used to plan and manage a complex communications event in a factory where the managers wanted to bring about a culture change among its employees. The 450 staff worked permanently in three shifts and were roughly equally distributed in terms of numbers. It was decided to hold a communications session with each shift to enable the factory managers to share their vision of the future with the staff. The session comprised the following broad elements:

- Brief presentation by the factory manager on his vision of the future.

- Teams dispersed and, helped by trained facilitators, discussed three key questions.
- Teams returned to the main room and gave their responses, table by table.
- Factory manager responded to the issues raised by the teams.

After outlining the guidelines for each step we will refer back to the factory setting and show how each part of the process was handled there.

Step One – Lead-in presentation

For teams to be able to work effectively they need some basic facts or background on which to base their discussions or activities. So a useful preliminary is to have some form of presentation or input, which gives the teams some facts or opinions to get them started:

- This could be a guest speaker who delivers a stimulating or motivational presentation.
- It could be an industry 'expert' who shares some new research with the delegates.
- It could be a senior manager who asks for a new level of commitment to change or working practices.

By the end of this step the delegates should have a new level of knowledge or insight into the situation to enable them to go away and contribute meaningfully to the team task.

Case Study – Step One

The communication session opened with an address by the factory manager in which he:

- outlined the broad strategy being adopted by the factory management team;
- indicated what changes might occur and when they might be expected;
- discussed the future for the factory within the international group;
- asked for their full commitment.

The overall presentation lasted for 45 minutes and was repeated three times during the day: 10.45–11.30 pm for the night shift; 9.45–10.30 am for the morning shift, and 2.45–3.30 pm for the afternoon shift. Incidentally, starting the whole process with the night shift was a novel feature by itself. Normally the night shift is forgotten altogether or seen last, which doesn't enhance their self-esteem. So involving them first in this process had a benefit all of its own.

Step Two – Briefing for the workshop

Armed with some new knowledge or insight, delegates are ready to discuss implementation, or how it might change their lives. To ensure that the team-based work is productive, and contributes effectively towards the overall objectives, they need a comprehensive briefing which is best accomplished via three media:

- Tell them in simple language what you want them to do.
- Show them the task, perhaps using slides or posters.
- Give them a handout which explains what outcomes you're expecting and what format they should be given in.

Case Study – Step Two

Back to the case study. After the factory manager's address the facilitator for the session briefed the 150-odd staff for the next step in the process:

- He posed three key discussion questions for the teams.
- He outlined how delegates could participate in the discussions.
- He reminded people of the Post-it Note guarantee [that any issue raised would be answered within a given period of time].
- He described how the feedback should be given and mentioned that facilitators already had pre-prepared OHT acetates on which they could record their key points.
- He then invited team facilitators to take their groups away to start the discussions.

Step Three – Workshop activity

This is when the teams actually get down to some work away from the main group. For them to be successful they needed:

- good briefing to ensure that they start with the right objective and stay focused throughout their discussions;
- a suitable place to work together – free from distractions and with the right equipment;
- an optimum number of people, with a representative spread of views and opinions;
- enough time to do justice to the topic – 50 minutes was given;
- a clear idea of the output[s] they were expected to produce;
- ideally, their own facilitator who kept them on track;
- a set of ground rules they all agreed to operate by.

Case Study – Step Three

Back to the case study again. Having been briefed, the delegates dispersed into 10 team areas, together with their own facilitator, who then led their groups through structured discussions:

- He/she kept the focus on the three key questions.
- They identified key points for the subsequent feedback session.
- They prepared slides for the feedback session.
- They helped the team to select a presenter who would give the feedback.
- Finally, they coached the presenter for their role.

Facilitators prepared their team rooms in advance to create the right environment for discussion, as well as checking that equipment and materials were in place.

Step Four – Feedback session

Finally, gather all the staff back in the main room and collect their feedback on the three key questions. Juggling time is quite a challenge:

- Spend too long on the feedback and the session can lose energy and people become bored.
- Don't allow enough time and you will miss out on valuable feedback, and demotivate the delegates who have spent precious time debating your issues.

Once you have heard from all the teams, allow time to respond to the common issues or threads which have emerged. Again you will need to consider how to manage this without it seeming obvious that you have a pre-prepared response 'up your sleeve'.

Case Study – Step Four

On the day, we scheduled a refreshment break after the team discussions which, amongst other things, enabled the plenary feedback session to start with everyone in place.

- The team presenters took turns to report their responses to the three questions.
- The factory manager listened to the views expressed.
- Once all groups had presented, the factory manager responded to the main issues.
- He guaranteed to reply personally to all the issues on Post-it Notes.
- Finally, he ended on a positive and uplifting note.

Altogether over an hour was scheduled for this closing plenary session, which allowed enough time for the teams to give their feedback, and still gave the factory manager some 20 minutes to respond to their comments and reactions. The event was well received by all three shifts and led to a gradual and perceptible change in the culture within the factory.

2. Reversed workshop sessions

Another approach to designing workshop sessions is to juggle the sequence around so that you end with the expert's presentation instead of opening with it. The theme of this particular session was to explore ways in which computers and IT could be introduced to improve existing business practices. The guest speaker used a novel approach along the lines of the reversed workshop session.

Step One – Introduction and briefing for the workshop

The overall leader for the session introduces his/herself to the teams and gives enough detail about the topic for the delegates to be able to contribute meaningfully to the workshop activity. This means that the topic should be one with which they are fairly familiar and the facilitator is asking them perhaps to look at the issue from a novel or unusual angle. In addition to introducing the topic the session leader also briefs the delegates for the workshop activity, setting the task, team membership, timings, outputs etc.

Case Study – Step One

Having introduced himself and the topic the speaker told the delegates that they were to be introduced to an unusual business setting and they were to look for possible IT applications. He then showed a short [10-minute] video which explored the way that the international flower market has blossomed in Holland. It covered everything from growing, distribution, the way the auctions operated through to final delivery to the end consumer.

Step Two – Workshop activity

This is pretty much the same as in the conventional workshop model – the teams go to their designated area and get stuck into the task. They produce the required outputs and prepare themselves to feed back to the main group.

Case Study – Step Two

The teams dispersed, and explored possible IT applications in the flower market. Having produced the required outputs they prepared their feedback to the main group.

Step Three – Feedback session

The teams return and share the results of their discussions or activities with the other teams. The session leader now acts as a facilitator, drawing out key points or underlying principles which he or she will develop in the final part of the session.

Case Study – Step Three

The teams returned and shared their thoughts. The guest speaker facilitated drawing out key points to develop in the final part of the session.

Step Four – Concluding presentation

The session leader now takes centre stage and, using the outputs from the team discussions, develops the main themes of their presentation. If done well, this approach is highly effective as the delegates see their ideas or conclusions being incorporated into the overall presentation. It must be done skilfully or the delegates may simply feel that they have been manipulated to produce results which fitted into an already ordained scheme. And that will alienate them – which is the totally opposite reaction from what you want!

Case Study – Step Four

The speaker resumed control of the session and, using the outputs from the team discussions, developed the main themes of his presentation. He was able to show the delegates how their ideas could form the basis of a wider plan, and also how his particular expertise could exploit situations in ways they hadn't considered.

Please take a few minutes to consider how you might use workshop sessions in your programme.

Template S: **Structure the learning.**
Task S5: **Workshop sessions.**
Duration: **30 minutes.**

3. Team-based projects

Nothing cements people more effectively than working together in small teams on a specific task. Also, team-based projects change the whole basis of a course or workshop from being a one-way presentation of facts into a two-way, in-depth exploration of how delegates can use the new ideas or techniques. This section gives some ideas on how you can design light-hearted yet focused team activities, which can be used as stand-alone projects, or within courses, workshops or conferences to provide a motivating and energizing experience. A lot of the 'nuts and bolts' has already been covered in the last section so won't be repeated.

To give you some ideas of what you could do, here are some typical team projects, lasting from a few hours, to several hours spread over a number of days:

- Task One – to produce a video highlighting a new business opportunity.
- Task Two – to produce a website for the department.
- Task Three – to evaluate a CD ROM-based training package.

Task One – Make a video

This particular task challenges the team to produce a focused video in a very short period of time. They are given a basic video kit of camera and tripod, together with access to a range of materials and props. In this particular example there was additional pressure as the teams had to incorporate several fancy-dress costumes, chosen at random, into the story line. The resulting videos were scored by the whole team in a riotous after-dinner session which resulted in the winning teams and individuals being presented with Oscars! This type of 'make a video' project works very well for a wide range of applications as it is a *task within a task*. For example:

- If you're running a session on planning then you set the team the task of producing a video on the key elements of good planning. Not only do they have to focus their minds on what the key principles are, but they also get the opportunity to put the skills into action!

Task Two – Produce a website

This task unleashed a lot of creative energy. It made people really think about what they did and contributed to the organization, and how others might perceive them. It's best, if you can, to have some 'technical wizards' on hand to help the teams with the more technical aspects of developing the website, otherwise the available time can quickly be lost in dealing with the computing aspects.

The team sessions were scheduled over several days, which gave them sufficient time to develop really professional-looking websites. At the end of the overall programme the resulting websites were evaluated by a team of respected experts in several criteria, including creativity, innovation and overall impact.

Task Three – Evaluate a product

Teams were asked to evaluate and report on a product which was relevant to their discipline or specialism. In this particular example the teams, all from the public affairs discipline, were asked to evaluate a CD ROM-based training programme.

The teams were allocated several working sessions spread over a two-week period to complete the task. This was also a 'task within a task' as they were evaluating a product which provided media training, and so the very business of researching the product meant that they were absorbing much of the content. The general approach works well for a wide variety of applications and people naturally take an interest in a subject which relates to their own work area.

When's the best time?

We suggest you schedule these team projects at times when people's energy or interest levels are flagging. So schedule them at the end of the day and, if the event lasts over several days, schedule the team-working sessions evenly throughout the programme. If you can arrange for the finale of the team sessions to occur towards the end of the event, perhaps with some humorous prizes, so much the better! Looking at the timing of the examples given in this section:

- Task one – to produce a video highlighting a new business opportunity. This was used at the end of a long and intensive first day of a two-day team-building workshop. It released the tensions and provided a really fun and motivating experience in the run-up to dinner.
- Task two – to produce a website for a company. The teams were asked to produce their websites during three working sessions scheduled at the end of the formal business each day in a four-day training workshop. Getting together with team colleagues provided a light-hearted interlude in an otherwise busy programme.
- Task three – to evaluate a CD ROM-based training package. The teams were asked to evaluate this complex product over five working sessions scheduled during an extended two-week training programme. Returning to this task periodically helped to refresh key principles and also acted as an informal, and quite unconscious, training medium.

Design criteria

To secure the maximum degree of personal involvement, and hence success, check your plan against these design criteria.

Task

- The task must be relevant to their jobs.
- Provide a comprehensive briefing.
- Make the task challenging – put them under pressure.
- Provide all the necessary resources and give technical back-up.

The teams

- Keep the teams small – ideally five to seven people.
- Give each team its own dedicated work area.
- Give the team a sense of identity – team names, badges logos, etc.

Timings

- Schedule the start-time for the working session[s].
- Allow the participants to decide how long to work.
- If spread over several days – schedule the sessions late in the afternoon.

The spirit

- Keep the pace up – impart a sense of urgency!
- Make it competitive – tell them the success criteria at the start.
- Award prizes in a high-energy public setting.
- Have the teams produce outputs they can actually use after the event.

Using commercially available games and exercises

As you are well aware, there are a huge number of excellent games and exercises available commercially, which have been carefully researched and designed to develop specific skills and behaviours. If you intend using any, please remember that, as well as following the author's guidelines, you should also take account of the design criteria we've outlined above.

4. Designing skill practice sessions

Many of the courses you design will focus on developing specific skills, and you must give your delegates the opportunity to practise them in a safe environment. Upfront let's deal with the way you describe the sessions. For some reason people look horrified if told they'll be doing a 'role play' – but seem to quite happy when told they'll be doing a 'skill practice'!

Session design

The same overall design principles apply as we've covered in the previous sections.

- Step One – Give a short linking presentation which clarifies the purpose and objectives of the session.
- Step Two – Briefing for skill practice – outline times, teams, roles, feedback guidelines, locations, etc.
- Step Three – Delegates undertake the skill practices.
- Step Four – Hold a feedback session to consolidate learning.

Team size

People seem most comfortable working in small teams and probably the ideal number is three or four. For example, if they're practising interviewing skills delegates can rotate around three roles: one person being the 'interviewer', one being the 'candidate', and the other two observing. After each 'round' they give feedback to the 'interviewer' before changing roles and doing it again, until they have all been the 'interviewer' and 'candidate'.

There are times when it's acceptable to work in a larger group. For example, when practising presentation skills most people realize that standing up in front of a larger number of people gives them a more realistic experience than presenting to two or three people.

Team membership

There are some potential problems to be aware of:

- Personality clashes. Occasionally you may become aware of personality clashes in the group, which may influence team membership. My preference is generally to let delegates decide whom they wish to work with, which means that people with long-standing issues will avoid each other.
- The only time you may wish to break this rule is if the focus of the course or workshop is on, say, 'improving team working'. In this case, forcing these people to work together gives them something very tangible to work with – and may start to heal some of the underlying issues.
- The other common challenge is: do you have a manager and one of their staff in the same team? It depends on the situation and the relationship between those involved. If the manager is receptive to feedback they will often receive valuable information normally denied to them. However, you often find that the staff member feels inhibited by the presence of their manager, so they contribute less and, as a result, benefit less from the course.

The scenario

Every skill practice needs a scenario which delegates can focus on – do you provide it or do you let delegates provide their own? Let's explore the arguments for each approach.

You provide scenarios – advantages

- Relevant topic – you know the focus of their sessions.
- Consistent focus – every course will focus on the same issues.
- Time saving – you save the time delegates need to think of and describe the situation.

You provide scenarios – disadvantages

- Topic relevance – not everyone may relate to the chosen topic.
- Playing a role – delegates may feel uncomfortable adopting a role which is foreign to them.

Delegates provide scenarios – advantages

- People get to practise situations they have to deal with.
- Very quickly the 'skill practice' feels real.

Delegates provide scenarios – disadvantages

- Panic! – 'I can't think of a situation at the moment!'
- Time wasting – delegates need time to think of and describe the situation.
- Relevance – the topics may stray away from the main course theme.

A good middle course is to ask delegates to offer their own scenarios, but to have a selection of scenario briefings available which delegates can use if they can't think of their own topic. That way you cover both options. In a later chapter we'll explore some of the issues surrounding good course materials.

Location

For skill practice sessions to be effective the teams need somewhere quiet to prepare and then hold their sessions. If you have a large training room you can possibly have two groups in there, provided they are well away from each other. Otherwise, you may need to include additional rooms in the venue specification to ensure that you have the right amount of working areas.

Template S:	**Structure the learning.**
Task S6:	**Skill practice sessions.**
Duration:	**30 minutes.**

5. Using actors

One certain way you can overcome delegates' reluctance to take part in skill practice sessions is to use actors to play key roles. This way delegates are only ever asked to be natural and play themselves. Of course, there are significant budget issues involved but, by careful scheduling, it is possible to spread the costs. Sharing two examples of working with actors in training programmes should illustrate the benefits.

When to use actors

One popular use is in recruitment courses when actors play the 'candidates'. By giving them a careful brief you can be certain that the 'interviewers' will all be presented with identical 'candidates'.

- For example, when we have three actors I brief one of them to be: 'Pushy, overconfident and, when challenged, not as experienced as they portray'. Another is briefed to be: 'Quiet, unassuming, reasonably experienced but not assertive.' And the final one to be: 'Quietly confident, modest about achievements, well experienced for the job and focused on getting it.' That way the interviewing panels are all presented with the same evidence. It's interesting to see the different ways that people collect the evidence.

Another popular usage is in performance management courses when the actors play the staff members, leaving the course delegates to play themselves – the managers or team leaders. We generally ask the actors to work in two main types of session during the course.

- Introductory scene. Delegates are introduced to the actors and the wider scenario in a short scene, lasting perhaps 15 minutes. Delegates then have the opportunity to interact with the characters being played, and so learn more about the company setting and the roles the actors are playing.

- The course then breaks into a series of one-to-one performance discussions when each delegate has the opportunity to discuss performance with one character, while other delegates observe. The timetable allows each delegate to hold at least one of these one-to-one sessions.
- The actors have a clear briefing about their character and the issues they are facing, and will respond very realistically to the way they are handled by their 'manager'. Depending on the sensitivity of the 'manager', I have seen one character come out of the one-to-one showing a growing sense of confidence about the future, while another 'manager' prompted a full mental breakdown!
- Repeated over two days the delegates experience a wide range of situations, both first hand and observing.

Benefits of actors

So the overall benefits of using actors are:

- delegates only have to be themselves – no 'role playing' involved;
- consistent characters – depending on the quality of the briefing they are given;
- natural responses to different ways of being 'managed';
- excellent, perceptive feedback to delegates on their performance;
- brings an 'authentic' feel to a course or programme.

There are many reputable companies who supply actors for specific industries. Alternatively, ask your colleagues in other industries – you will quickly get a list of recommended companies… and those to avoid!

Template S: **Structure the learning.**
Task S7: **Using actors.**
Duration: **30 minutes.**

11

Design each session in detail

1. Comply with company standards and policies
2. The overall template
3. The session plan
4. Timings
5. Session title
6. Objectives
7. Learning methods
8. Admin and logistics
9. A real example
10. 'Diet' session plan
11. Sponsor 'sign off'

1. Comply with company standards and policies

You are now well into the 'S' step of the DESIGN model. Having considered the most effective way to deliver each session and how to design workshop or team-based activities, you are now ready to design each session in detail, and then finalize the course timetable.

As you start the process, look outside your training perspective and consider other factors which may influence your design. Depending on the topic, there will be a varying amount of company-specific information, processes, standards or policies which must be incorporated into your design, and you need to find and use them. Failure to identify these 'givens' can cause you grief at a later stage of design – at the very least you can waste valuable time while you gain the 'buy in' of people who 'own' the company standards. At worst, they can derail your whole design process and insist that whole chunks of the course are redesigned:

- For example, if you're designing a course on selling your company's products you must use exactly the same materials used elsewhere in the sales process. Contracts, specifications, conditions, prices, terminology, brand images etc will all be defined by the relevant marketing teams and you must use them all, exactly as they are.
- Delegates may also need to pass assessments or certification during or after the course to show that they have met the requirements of appropriate certification boards. Some industries are more strictly governed than others, for example financial services.
- However, if you're designing a course on, for example, performance management, the situation will be more fluid. There will be many company standard procedures and policies which will have to be incorporated into the course, for example the company discipline procedure. There will also be many other aspects of performance management which are more generic, for example soft skills, and which can be imported as best practice from outside the company. Examples could be asking open questions and helping an individual to boost their self-esteem.
- If you're designing a presentation skills course then the situation is likely to be different again. Apart from some general advice about using standard PowerPoint templates, there will probably be little mandatory material to be incorporated.

You will need all these materials, ideally in electronic format, so that you can use them with the minimum amount of reworking. In many companies these materials exist in the company intranet. Is there any other content that should also be included in your training package? Perhaps there has been a recent directive or some recent legislation which has to be stressed to all employees. For example, a recruitment and selection course would include a section on diversity.

Template S: **Structure the learning.**
Task S8: **Compliance with standards.**
Duration: **40 minutes.**

2. The overall template

Before looking at the detailed design of each session it's useful to have an overall template for your course, into which you can fit the individual components. If you're designing a one-day course then a template like this may help you (Figure 11.1 overleaf).

3. The session plan

At the heart of every well-designed course or workshop is a detailed session plan which sets out exactly what the trainer will do, and when and how they will do it. Of course, as trainers gather experience of a particular course they will need to refer to the session plan less, but it's always there as a back-up. So what does a good session plan look like? We'll show you two formats – the traditional horizontal [landscape] plan and a shortened [portrait] style (Figure 11.2 overleaf).

4. Timings

Start time

The start time is just that – when you expect this session to begin. On the actual day the trainer may have a few 'no shows' at the published start time, so they may have to delay the start by a little. Then as the course progresses, the trainer always has a guideline as to what stage they should be at when they reach key milestones, such as morning break or lunchtime.

Finish time

Knowing the time that each session should finish gives the trainer a good reference point as they progress through the course.

An overall template

Get a broad shape for your course

Welcome	Create a positive atmosphere
Opening session	Start the learning journey
	Timely break
Skill-building session	Continue the learning journey
	Light lunch break
Energizer	Restart the afternoon energetically
Skill-building session	Continue the learning journey
	Overcome the afternoon 'wilt'
Final skill-building session	Final opportunity for learning
Action planning	Commit to personal action points
Close on a high!	Everyone leaves feeling good!

Figure 11.1 Course template

One-day Presentation Skills Course						
Start time	Finish time	Duration	Session title	Objectives	Learning methods	Admin & logistics
0900	0930	30	Welcome	Welcome delegates to the course. Clarify objectives. Safety & domestics. Introductions.	Trainer introduction. Delegates introduce themselves. Refer to pre-course work.	Delegate name cards. Workbooks. PowerPoint intro.
0930	1015	45	Designing your presentati on	Accept the need for preparation. Practise two visual techniques. Start design for own presentation.	Trainer-led discussion. Demonstrate two visual planning methods. Delegates practise on their own topics.	PP slides. A3 paper for mind maps. Plenty of Post-it Notes!

Figure 11.2 Draft session plan

Duration

The trainer will need to be flexible about the duration of each session as so much depends on the prior knowledge, skills or attitudes of the delegates. An experienced trainer will quickly assess which sessions can be whizzed through quite fast, and which may need more time than scheduled. Or perhaps there is a 'sticking point' which has to be dealt with before the trainer can make progress with the course topic.

This often happens with internal courses where there may be a 'hidden agenda' associated with the course or topic. For example, some clients rely on having 'suitably qualified and experienced people' [SQEP] at each of its sites, who become the 'experts' in particular disciplines or knowledge areas.

I was asked to deliver a series of courses to refresh the training and coaching skills of these SQEPs, not realizing that there were considerable 'political' issues surrounding a proposed company-wide restructuring, which would involve significant redundancies or relocation.

The delegates wanted to vent their frustration at the way the restructuring was being managed, and I had to devote a certain amount of time to this before we could make a start on the course content. A less experienced trainer might have tried to bypass these issues and stick to the session plan, not realizing that the group wouldn't want to learn anything until they were given the opportunity to air their grievances.

5. Session title

Giving each session its own title helps everyone to see the shape and direction of the course:

- It helps the sponsor to 'sign off' the design, especially if you can use some of their key words or phrases in the session titles.
- A good session title then helps the trainer to see how they're progressing through the course, as the names of each session should illustrate the flow of the topics.
- Lastly, the session titles, if chosen well, should 'signpost' progress to the course delegates and help them see what stage they've reached.

6. Objectives

The next column states the objective for the session. The heading at the top of the column implies the following words: 'By the end of this session delegates should…' It's essential to write focused objectives for each session to keep you, the designer, in touch with the fundamental reasons for having the course or workshop. Writing focused objectives is actually much harder than you think, so we'll take a few minutes to explore what's involved. You may hear people talk about 'aims' and 'objectives' as though they are the same – but they're actually quite different:

- An 'aim' is a statement of general intent which gives a broad indication of the achievement required. For example: 'We aim to improve performance in the company.'
- An 'objective', on the other hand, is a clearly defined milestone which is a step towards achieving an aim. It should specify what action is to be taken, how it will be measured and when it will happen. For example: 'Our objective is to train managers in "performance management" and ensure that everyone has been trained by the end of the financial year.'

Three essential ingredients

So what should your objectives look like? One thing you can sure of – the better defined they are the easier it is to design training that works. And the 'tighter' your design the more likely people will actually deliver the required changes in performance. A good objective answers these three questions:

- Performance – What do I want people to be able to do after the session?
- Criteria – How well must they perform the operational requirements?
- Conditions – In what context or situation must the skill be performed? Tools, resources, constraints, environment?

For example:

- Performance: *'Administrators will enter all required delegate registration information...'*
- Criteria: *'… error-free in four minutes or less…'*
- Conditions: *'… using the company's standard word processing system.'*

This degree of detail gives you a flying start as you design each session – for example, you would know that this particular session would have to:

- ensure that course delegates really understand what the minimum 'delegate registration information' actually is;

- give them the opportunity to practise entering the information on the company standard word processing system;
- provide opportunities for them to build their skills so that they can show they can do it consistently error-free, in four minutes or less. So you'll need to build in time for them to show that they can do it.

Please take a few minutes to consider how you will draft learning objectives for your course.

Template S: **Structure the learning.**
Task S9: **Learning objectives.**
Duration: **45 minutes.**

7. Learning methods

Having decided how you intend to deliver each session, the session plan should give as much detail as the trainer will require. If you're doing the training yourself, all you need is enough to jog your memory. If someone else will be delivering the training you will need to give enough detail to ensure that your design is followed consistently. This becomes even more important if the training is to be delivered by a number of trainers… at varying sites… and possibly in different countries.

Whatever detailed methods you intend to use, remember that each session normally breaks down into three main 'chunks' – the beginning, the main body and the end. For a 45-minute session you might need 5 minutes for the beginning, 30–35 minutes for the main body, and 5–10 minutes for the close.

The beginning

How the trainer opens each session is vitally important as they need to establish their own credibility quickly before engaging the delegates' interest in the topic. The delegates need to believe in the trainer's skills, knowledge or expertise if they are to accept what they say. But there's a delicate balance to be struck. If the trainer comes over as being 'full of themselves' and brags about their success or achievements, the audience may decide to take them down a peg. Conversely, if the trainer is too modest the audience may decide they don't have enough to offer and not engage with them.

A well-known mnemonic for a good start is INTRO:

- I – Interest/Impact. Engage the delegates by asking a controversial question; or by making a provocative statement; or by telling them something startling; or by referring to a current 'hot' topic ['Did you see in today's paper…?'].
- N – Need. Why should the delegates be there, let alone listen and learn? Put yourself in the delegates' shoes and see how you can make it relevant to them.
- T – Timing. Say how long each session will be, and how it fits into the overall plan for the course. 'This session lasts for 45 minutes, after which we'll be having the morning break.'
- R – Range. Briefly outline the range or scope of this session, and how it fits into the overall plan. Note the emphasis on the word 'briefly' – don't give too much detail at this stage.
- O – Objectives. Tell them specifically what they will take away from the session.

Of course, the constituent parts of INTRO don't need to be said in exactly this order, just as long as they are covered. There are also several other important things to remember about the opening, especially if it's the first session of the course or workshop.

'You're on before you're on.' Delegates form impressions of the trainer from the first moment they see them, and that may be quite some time before the course actually starts. Remind the trainer to be 'on parade' in terms of dress, organization and manner long before they arrive at the training venue.

Workbooks or handouts. If you intend to give people materials tell them early on, to save them the chore of writing. If they have their heads down taking notes they will not be listening to the trainer. And they'll curse you for not telling them!

When to deal with questions. There are three options: answer them as you go through, leave them to the end, or both:

- Answering questions as you go can potentially distract the trainer from the thrust of their session, but has the advantage of involving the delegates right from the start. Participation – one of the most important underlying principles of good training.
- Leaving questions to the end will be very frustrating for people who cannot understand some key concept early on – they will disengage from the session.
- So the best solution is to take questions as and when they arise, and also allow time for questions at the end.

The main body

Ensure that you design a logical sequence, which will make it easier for the delegates to follow the learning points. If you're planning a conventional 'presentation' style then you might wish to use one of the following models:

- Chronological. Journey from the past, to the present and into the future.
- Spatial. Imagine describing your new house to your friends. 'You go in the front door and on the left is the kitchen – the stairs are straight ahead…'
- Business project – the four Ps. Start with the Position or situation. Then describe the Problem or opportunities that arise. Next outline Possible solutions, before giving a firm Proposal.
- Product life-cycle. Briefly go through the stages one by one – market research, develop the product, production, marketing, distribution and sales.
- Problem solving. Start with the diagnostic phase – define the problem, collect data, then search for root causes. Follow with the remedial phase – identify possible options, choose the best solution, then implement the solution with energy.

Whatever you do, ensure that it's relevant and interesting to the delegates, and that it also meets the session objectives. It's so easy to get carried away with creative designs which, when tested against the objectives, can so easily miss the target. There are many different views about how many different concepts you should include in any one session:

- Many believe in the 'rule of three', which probably comes from sales training where trainees are taught to have no more than three options on the table at any one time.
- Others believe in the 'six plus or minus two' rule – which suggests that people are best able to manage between four and eight ideas at any one time.

The best guideline is the topic itself. Imagine the flow from the delegates' point of view, especially when you consider what went before and what comes after. How much detail do you put in the session plan? As much as is required to ensure that the trainer follows the sequence you want, so that delegates gain the required amount of learning from the session.

The end

Every session should close positively when the trainer reviews what's happened, and clarifies any issues or concerns the delegates may have. We would suggest that you do this in two parts:

- First build in time for questions and answers to clarify any outstanding issues or concerns.
- Then close each session with a short summary of what the delegates should have learnt.

Why do it that way round when the normal approach is to give the summary before asking for questions? Simple really. If you close with the Q&A session the trainer may be confronted with a question they can't answer. That way the session closes with the trainer saying: 'I'm sorry I don't know the answer to that.' Not a very good way to end.

However, using the recommended approach, the last thing the delegates hear is the trainer's high-impact and succinct summary of what the session was about. And that's what they'll remember.

8. Admin and logistics

Use the last column to record all the practical stuff the trainer needs to make it all happen, such as delegate name cards, materials, equipment, workbooks, PowerPoint, flipcharts etc. In the example we quoted earlier, the trainer will need to have sufficient computer terminals for delegates to *'practise entering all required delegate registration information, error-free in four minutes or less'*.

9. A real example

Having been through the theory, let's see how it works in practice. We'll use session six of a one-day presentation skills course, which focuses on course delegates using Post-it Notes to develop the sequence of their presentations. The session might break into these three chunks (Figure 11.3 overleaf).

- The three 'timings' columns are self-explanatory.
- The 'title' for this session, *Planning the flow of your presentation*, clearly says what it's about.

Session six - One-day Presentation Skills Course

Start time	Finish time	Duration	Session title	Objectives	Learning methods	Admin & logistics
1100	1145	5	Planning the flow of your presentation	To introduce delegates to a visual planning technique	Trainer demonstrates using Post-it Notes to develop a presentation	PowerPoint slides
		30		Delegates try out the techniques for themselves	Delegates use the Post-it Notes to plan their own presentations	Plenty of Post-it Notes!
		10		Consolidate the learning	Trainer-led discussion – what went well? What could be better? How are the individual presentations shaping up?	Flipchart

Figure 11.3 Detailed session plan

- The 'objectives' column has been broken into the three chunks of the session, each dealing with different stages of the learning process.
- The 'methods' column shows how the three stages of the session will be delivered: trainer demonstration, practical experience and closing review.
- Finally the 'admin & logistics' column shows what the trainer will need for each phase of the session.

Why not design a session plan for one chunk of your training course to see how all the bits fit together?

Template S: **Structure the learning.**
Task S10: **Session plan.**
Duration: **45 minutes.**

10. 'Diet' session plan

The style of session plan we've just explored is good for newcomers to training, or for experienced trainers when delivering a session for the first time. But once you have some experience you will find that you can operate very effectively with a much simplified style of session plan such as this:

Session Six – Planning the flow of your presentation

- ❑ Introduce the topic and link to the earlier sessions.
- ❑ Stress that this session will help them put 'flesh on the bones' they developed using mind maps.
- ❑ Demonstrate using Post-it Notes for developing the presentation flow.
    - ❑ Show the PowerPoint presentation
    - ❑ Then illustrate using a real example
- ❑ Give everyone some Post-it Notes and ask them to find their own 'pitch'.
- ❑ Confirm that everyone has a topic to work on – offer to help anyone struggling.
- ❑ Set them going – walk around to help anyone who looks 'stuck'.
- ❑ After 15 minutes ask them to team up with a buddy and explain each other's plan.
- ❑ After 15 minutes re-form the main group and hold a group discussion.
- ❑ Draw out their reactions to the method and when they might use the technique.

Timings: 45 minutes. 11.00–11.45.

Figure 11.4 'Diet' session plan

11. Sponsor 'sign off'

We've stressed all the way through the importance of getting your sponsor to 'sign off' at every key stage of the design process. If you go ahead and do more detailed design without this approval you may have to do some time-consuming rework at a later, and more time-critical, stage.

Before moving on, confirm that your sponsor is satisfied with the detailed design. Are they happy with the plan, and, if not, what further work do they require?

Template S: Structure the learning.
Task S11: Sponsor's formal 'sign off'.
Duration: 10 minutes.

12

Blended learning

1. What is blended learning?

For years people have been experimenting with computers as a training tool but the technology hasn't been sophisticated enough. That's now changed – modern computers, coupled with intranets and the internet, mean that e-learning can now take its place as a serious contender in the training armoury. E-learning has many benefits which can directly improve the competitive advantage of your company:

- Staff acquire new skills when they need them, instead of waiting for the next scheduled training course.
- People can break the learning into 'chunks' to fit the demands and time-pressures of their own job.
- The time to learn underlying theory is minimized – people learn at different speeds, and may already know parts of the topic.
- Non-revenue-earning time is reduced, compared with traditional training courses, when the pace is determined by the slowest person.
- Any subsequent trainer-led course can focus on practising skills, removing the need to explore underlying theories.

- Trainer-led courses are thus shorter, with reduced costs – trainers, facilities, overnight accommodation, etc.

Although the focus tends to be on e-learning for the self-study element, you may already have a variety of other self-study resources, including:

- books and training packs;
- published articles;
- video tapes;
- DVDs;
- audio tapes;
- interactive videos;
- computer-based training;
- existing course designs and materials;
- one to one discussions;
- visits.

So e-learning really can deliver 'more for less' – greater skill levels with reduced costs but, for it to be effective, people need three stages of learning:

- Grasp the theory. Learners undertake a self-study e-learning course, supported by other learning resources, for example books or videos.
- Practise the skills. Learners practise their skills in a short, intensive trainer-led course. This where you come in.
- Apply the learning. Learners apply all the learning to reach new levels of business performance, supported by online coaching.

This approach of blending self-study and/or online learning with some trainer-led sessions has become known as blended learning. This chapter will show you what's different about designing the trainer-led course which follows on from the online learning. We are not attempting to cover the skills and techniques involved in designing the online materials as this is worth a book in its own right.

2. Immerse yourself

Join the project team

Say you're asked to design a trainer-led course to follow a course of online learning or some other self-study. The first thing to do, if you haven't been invited, is to get yourself on the team managing the whole e-learning project so that you are kept 'in the loop' on design issues. Otherwise you will suddenly find yourself 'dumped' with ill-defined tasks, or jobs that imply they can't be completed in the given timescales. Ensure that the trainer-led course is seen as an intrinsic part of the whole learning experience, and not simply an add-on which people experience some time later.

Do the course yourself

You will need to work through the complete online course so that you are fully conversant with the concepts presented. In most cases it will take less than a day to work through a complete online package, including taking all the mastery tests.

3. The trainer-led course

Recognize the downsides

While there are many advantages to using blended learning, like everything in life, it's not all roses. There are certain potential challenges which you will need to be aware of, and prepare for.

Varied amount of preparation

Sadly, not everyone approaches e-learning with the same degree of motivation. Personal commitments, coupled with the pressure at work, or frustrations with the performance of the IT network, mean that delegates arrive at your course with varying degrees of knowledge. But no matter how many 'health warnings' appear in the course joining instructions, typically the trainer will find in a group of eight delegates:

- Only three or four people will have completed the course fully.
- Some people will have completed most of the course, but with some gaps.
- At least one person will have either attempted less than 50% of the course material, or studied the course so long ago that their recall of the content is poor.

Identify the skills to be practised

When designing the blended learning programme the master designer will have grouped the course learning points into two piles: learning knowledge would be included in the e-learning course, and practising skills would be included in the trainer-led course. But ensure that these early decisions are reviewed – a topic destined for e-learning may now, based on feedback, seem right for the trainer-led course.

It's useful at this early stage to decide which models, techniques or skills need to be reinforced during the trainer-led course. At this stage, keep your mind open and just identify possible sessions for the course, recognizing that some of them may be dropped once you start to look at the time available.

Course duration

A one-day course should be sufficient to practise new skills and receive some meaningful feedback, depending on the number of delegates attending the course. Let's look at a practical example. Most people have attended a Presentation Skills course at some stage in their career, which probably lasted two days with a maximum of eight delegates:

- This format gives enough time to explore the theory, and allows each delegate to deliver three presentations during the course.
- By using e-learning to explore the theory you can reduce the trainer-led course to one day, and still allow time for meaningful skill enhancement.

One day should be sufficient to replace a two-day course, otherwise there is no convincing reason for the expense of creating the e-learning component.

How many delegates?

To have an effective one-day course you will need to limit the number of delegates. As the numbers increase, the amount of individual attention each delegate receives obviously falls, thus limiting the overall value of the experience:

- Most courses will work best with a maximum of eight delegates.
- And the minimum number? It depends on the course content, but in most cases it might be four.

Key milestones

One of the big advantages of e-learning is that learners can do it when they want, where they want, and spend as much time as they need. For the trainer-led course they must all be together, for the agreed duration, in one place. So you will need to:

- book an appropriately sized and equipped venue;
- ensure that a suitably qualified trainer is also available;
- design the workbooks and trainer presentations;
- confirm that all your learners are also available.

Sounds easy – and it is, provided you do it early enough! Which is why you need an effective course administrator in the project team. Remember also that this is the pilot course and you may need to make some changes, however small, before the course can be put on general release. This may be particularly important if you're harmonizing the course with some planned strategic initiative, so the sooner these dates are booked, the better.

If possible, schedule a review meeting the morning immediately after the pilot course. That way you get everyone together while the course is fresh in everyone's mind, and you don't lose any time preparing for the next course. It keeps the momentum going.

Finalize the budget

Final item for the agenda – agree the budgets for the courses and the development work. Looking through the paragraphs above will trigger thoughts about the various provisions you need to make.

Using a refresher quiz

It's important to ensure that the e-learning and the trainer-led course are not only consistent but clearly linked, so that they appear to be part of a continuous learning path. You must use the same language, models, fonts, images etc as these all reinforce a consistent approach.

Inevitably there will be a time delay between any particular person finishing the e-learning course and attending the trainer-led course, and this elapsed time will vary from person to person. There are two easy ways you can link the two learning experiences together:

- Use a refresher quiz during the course.
- Develop a delegate workbook.

The one-day trainer-led course will be very busy so we strongly recommend using a refresher quiz early in the course to:

- refresh the theoretical concepts covered in the e-learning;

- break the ice – encourage delegates to talk to each other;
- highlight any outstanding issues or concerns delegates may have;
- help the trainer to discover any potential barriers or individual learning needs before the day starts.

Designing a refresher quiz

If you're using a refresher quiz, why not follow the guidelines below?

Time

Decide how much time to allow for the refresher quiz session. We would recommend in total 45 minutes – 15 minutes for delegates to discuss the questions with a partner, followed by 30 minutes group discussion facilitated by the trainer. Using more time than this seriously eats into the time available for practising the skills.

Topics

Review the e-learning course and decide which topics you need to refresh before you start the practice sessions. Simply look through the e-learning course and jot a note on a Post-it Note every time you find a potentially useful question.

Select the questions

Having looked at a list of possible questions, select and discount them until you have the number you require. We recommend a maximum of 10 questions for the available time, and accept that not everyone will answer all the questions. They are there mainly to prompt discussion.

Write the answers

The final step is to write an answer sheet that the trainer can distribute following the group discussion.

Pilot the refresher quiz

Remember to try the refresher quiz out on a typical group of people who have completed the e-learning course. Their feedback will be most helpful. You can find an example of a refresher quiz, based on the Managing Meetings course, online.

Outline course design

If you have to design a trainer-led course for e-learning students to practise their skills, please take a few minutes to record your initial thoughts on what the course might look like.

Template S: **Structure the learning.**
Task S12: **Blended learning trainer-led course.**
Duration: **30 minutes.**

4. The delegate workbook

A workbook to accompany an e-learning course offers two main benefits:

- Working through an e-learning course should be interesting and help the learner to acquire lots of knowledge and skills, but without a permanent reminder of the topics the retention rate can easily fall dramatically once the screen is switched off.
- Another issue is continuity. It's very unlikely that the learner will work through the course end-to-end in one session. It's more likely that the course will be done in chunks, with varying amounts of time between sessions. A workbook will remind the learner where they got to in the previous session and so kick the latest session off more productively.

Why does this involve me?

If your role is confined to designing the trainer-led course you may well ask why the design of the course workbook should interest you. It's very simple – the person delivering the trainer-led course may well be the first 'human' contact the learners have and, if they have been at all unhappy with the online learning, guess who will get all their grief? That's right – the poor trainer, who may not have been at all involved with the design, will get all the learners' frustration dumped on him or her. Which all wastes valuable time in that precious one day of training.

So agree early with the master designer whether there are to be separate workbooks for the online component and the trainer-led course, or whether to combine them into one document. Either way you need a voice in designing what's produced.

Consistency with the on-screen image

It's important that the workbook should mirror exactly what the learner sees on the e-learning screen. So design the workbook and e-learning materials in parallel, and ensure that any changes or modifications to either are carried over into the complementary medium.

- The sequence and flow needs to be the same.
- Use identical concepts or models.
- Use the same characters in case studies – same names, sex, appearance etc.
- Use identical industries and settings.

Clarify the format and style of the workbook

The overall strategy

Agree the role the workbook plays in relation to achieving the overall goal of improving performance. The issues to consider include:

- How does the workbook fit alongside the course?
- What balance of content do you want?
- How large should it be – both size and pages?
- How does this workbook relate to the workbook that learners will get when they attend the trainer-led course?

Detailed design

Once these wider issues are settled you can begin the detailed workbook design. Of course, much will depend on the actual topic being presented, but there are still many common themes, including:

- front page – develop a consistent style across all the e-learning products;
- 'welcome' page;
- balance of text and graphics;
- how to refer to e-learning pages and other resources, eg company intranet;
- consistency with existing hard-copy documents;
- style – for example using Plain English;
- action planning page – consistent with existing style.

How will learners access the workbook?

A final aspect to consider is how learners will access the workbook, and there are at least two possible approaches. You can either produce the workbooks in bulk and send one to learners as they commence the course, or allow learners to print their own workbook on demand locally.

Template S:	**Structure the learning.**
Task S13:	**Blended learning workbook.**
Duration:	**30 minutes.**

13

Sights and sounds

1. Why use visual aids?

Variety is the spice of life, and most people remember what they see more easily than what they hear. But remember, visual aids can only make a good course better – they cannot transform a poor course into a good one. Visual aids are intended to enhance your ideas, not to relieve you of the responsibility for making them. Don't use visual aids for their own sake – each visual aid should have a specific purpose, and should emphasize or dramatize an important point.

Visual aids are a key element of any training course, whether it's the delegates' workbook or handouts, other course materials or the trainer's presentation. First of all, why do we use visual aids? There are many reasons, including:

- keeps the audience awake;
- helps to explain complex topics or diagrams;
- stimulates more of the senses;
- makes the message more memorable;
- brightens up a less interesting topic;
- prompts the trainer – so they don't have to look at notes.

It's important to design the training first, then decide what visual aids you need to reinforce the messages. Avoid the temptation to start with a visual aid and then decide where to use it. Wrong! As we go through the following design principles, remember that these guidelines apply to the hard-copy materials you produce as well as the trainer's presentation.

2. What visual aids can we use?

We always talk about 'visual' aids but it's worth remembering that there are at least five human senses. We'll leave the spiritual sense out of the discussions for the moment – that's another book! So we'll focus on:

- hearing – the easiest;
- seeing – next easiest;
- touching – getting harder;
- smelling – bit more challenging!
- tasting – difficult for many courses or topics.

Some topics [and industries] lend themselves more easily to stimulating a wider range of senses – for example the catering industry. But for many mainstream topics you can struggle to get past the top two. So what visuals can we use? The following list covers the usual suspects and, remember, the higher up the list – the more senses are stimulated!

- The real thing. Walk into the Rolls-Royce training centre where engineers are trained to maintain their aero-engines and you'll find an example of every current engine on trolleys. Stand alongside the

Trent 900 and you wonder how an aircraft wing ever supports the weight!

- Models. Showing people a detailed model, for example of a power station or a new office complex, makes the subject 'come alive'.
- Parts of the real thing. It's easy to bring parts or assemblies into the training room so that delegates can touch the equipment or components they'll be working with.
- Simulations. Flight simulators for pilot training are now so realistic that pilots converting onto other aircraft can almost do it without flying the real aircraft. On a more everyday level, simulated 'wounds' used in First Aid training are so real that the layman could feel faint just looking at them!
- Samples – eg packaging or products. Find items that delegates can touch and examine. A session on quality control for product packaging, for example, could be dull, but give delegates six samples and ask them to identify the production faults and it suddenly comes alive.
- Posters, photographs or other peripherals displayed around the training room stimulate interest in the topic. You may not notice it but people absorb so much information without realizing it.
- Computer visuals. PowerPoint is good but it is only two-dimensional. Macromedia Flash offers superb animation but creating or modifying presentations is beyond the skills of the average trainer.
- Overhead slides. Still a good standby for many situations.
- Hard copy – for people to keep and write on.

3. Basic design principles

Follow these guidelines to improve the effectiveness of your visual aids:

- Ideally, your visual aid should resemble a T-shirt – big, clear images with few words which should be self-explanatory.
- Make bold and imaginative use of colour whenever possible.
- Be aware that some colour contrasts will be difficult to read, especially red and green for colour-blind people [mainly men]. Question – is that why traffic lights have an amber light between red and green?
- If you design text-based visuals, ensure that they are simple and easy to read.

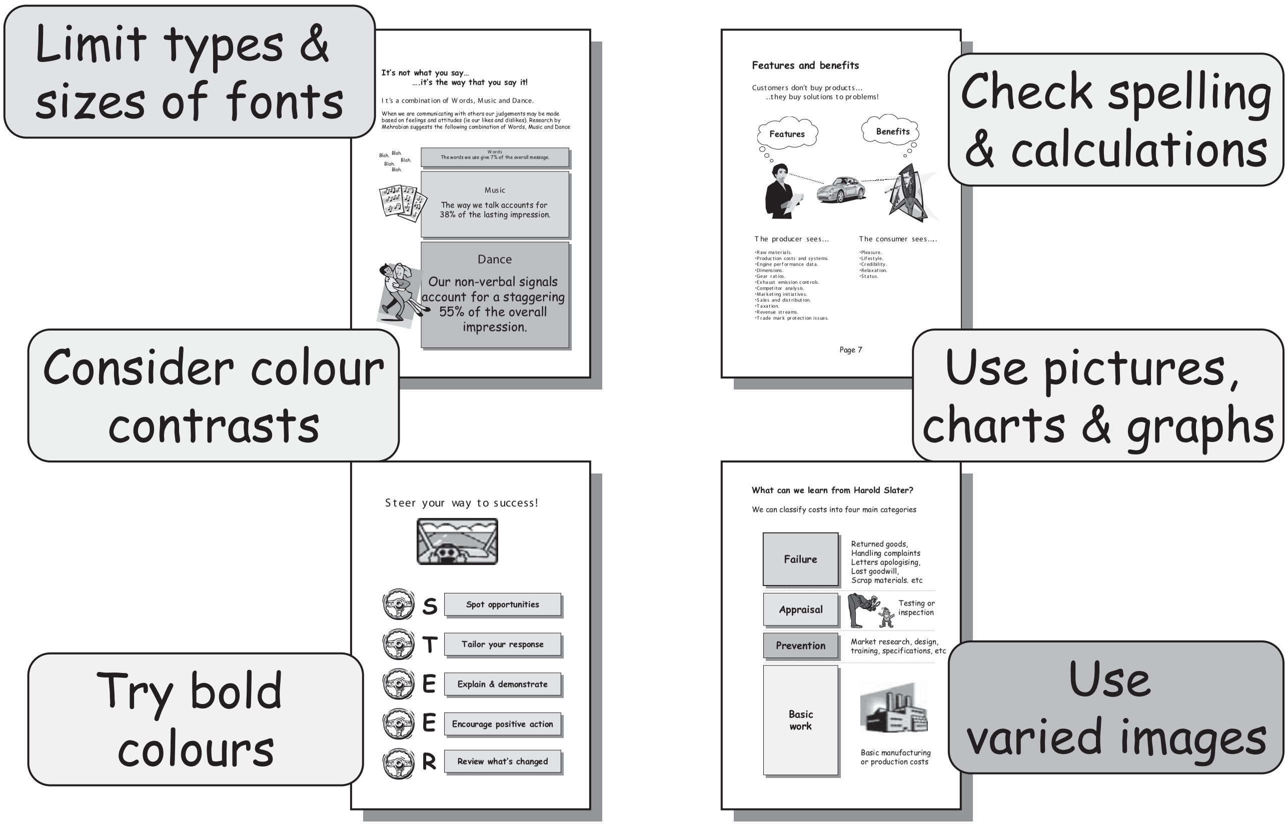


Figure 13.1 Designing good visuals

- Try to avoid showing numbers as raw data – whenever possible, display them as graphs, pie charts or histograms.
- Use the same font throughout and use a consistent hierarchy of font sizes for headings.
- Check spelling carefully as people will notice errors.
- Where appropriate, vary the design template to avoid the MEGO [my eyes glaze over!] effect.
- Always check calculations carefully – people will automatically add columns or charts to check that totals are correct.

Please take a few minutes to evaluate current visual aids – preferably some you have designed yourself.

Template S: **Structure the learning.**
Task S14: **Visual aids checklist.**
Duration: **20 minutes.**

4. Creating flipcharts

Flipcharts are ideal for many sessions.

Flipcharts – good points

- Flipcharts are easy to use, and enable you to add to your visual aid as the training session develops.
- They are also good for collecting ideas from people in real time.
- Being 'low tech' they are also immune to power failures!

Flipcharts – downsides

- Limited group size – the maximum being 14 to 16 delegates.
- Handwriting dependent.
- If you produce lots of sheets – how will you display and extract information from them?

Preparing flipcharts

- To create the flipchart live before the audience, lightly pencil the outline before the session.
- Similarly, you can write prompts or comments in light pencil on your flipchart, to remind you of key points during your presentation. The audience will not be able to see the pencil remarks.
- Alternate your visuals with blank sheets of flipchart paper, to avoid distraction by the last visual.
- Use 'strong' colours like black, red, green, brown and blue. Avoid 'weak' colours like orange and yellow – the audience will not be able to read them.

5. Overhead transparencies

Overhead transparencies are excellent for formal training sessions, or for addressing a large audience. They are easy to prepare and easy to read from a distance.

Overhead projector – good points

- Moderate quality image.
- Flexibility in sequencing.
- Easy to build up overlays.
- Medium tech – some risk.

Overhead projector – downsides

- Cannot modify the message.
- Slides can be bulky.
- Projectors are often heavy.
- Projectors – noise and bulbs.

Preparing an effective overhead transparency

- Design the draft on paper until you are happy with the layout and overall appearance.
- If possible, consult in-house design or drawing office staff for advice.

- Don't make an OHP slide by photocopying an A4 page of typed text – it will be unreadable.
- Use overlays to build up a complex visual.
- Remember the '6, 7, 8 Rule'. Write a maximum of six words per line, on no more than seven lines per image, using letters 8 mm high.
- Leave adequate margins so that the complete image is projected.
- Write prompting comments around the mounting frame so that you can easily read them during the presentation.
- Try the readability test. Stand up and drop your OHP on the floor. Can you read it? If not, the audience won't be able to either.

6. Computer graphics

Modern computer graphics packages like PowerPoint have revolutionized visual aids – the only limitation is your own creativity.

Computer projector – good points

- High-quality image.
- Easy to modify the message and customize it to the audience.
- Limitless visual effects.
- Easy to carry around.

Computer projector – downsides

- Limited sequencing flexibility.
- Projector and software compatibility – getting better all the time.
- Risk of audience overload.

Hyperlinks

One drawback of PowerPoint is that, once you start a presentation, you have to follow the prepared sequence. If the trainer wishes to jump to another slide, in response to a delegate's question, for example, it takes some effort [and presence of mind] to find the right slide in front of the audience. However, it's possible, using hyperlinks, to build-in some flexibility.

Here's how it's done using PowerPoint 2007. Let's assume you create four slides on presentation skills which could look like Figure 13.3.

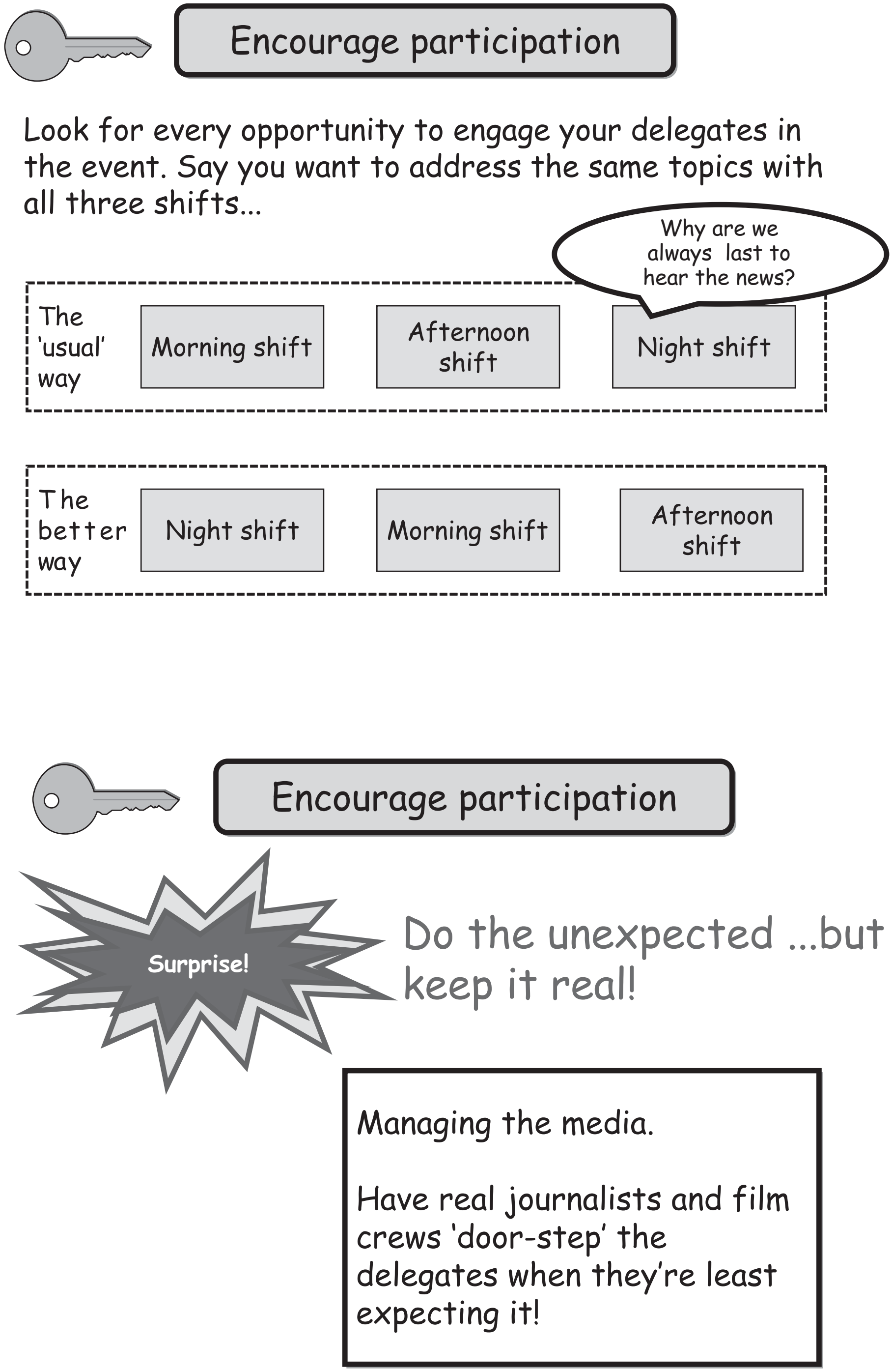


Figure 13.2 Clear slide design, which animates well (top); good slide design – clear, uncluttered message (bottom)

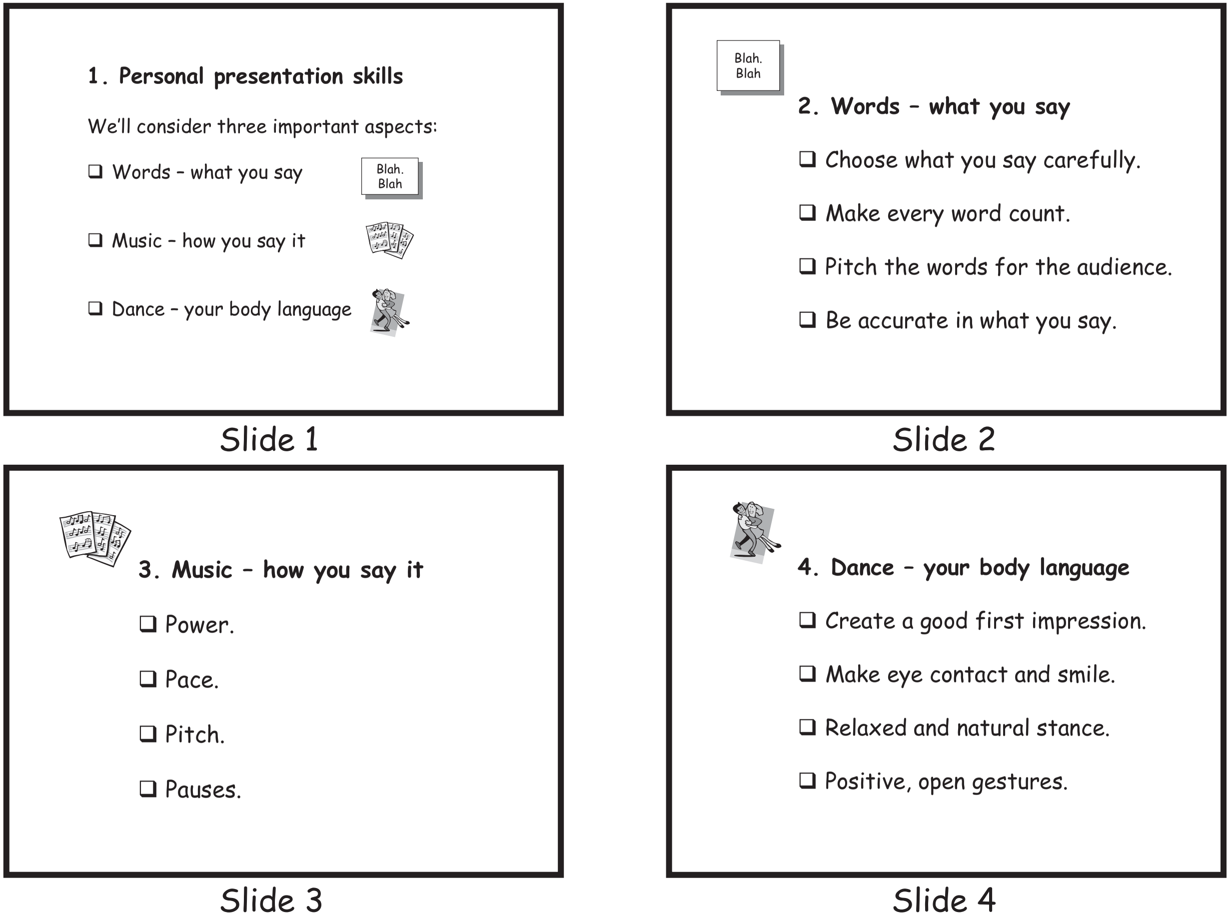


Figure 13.3 The four slides

To create hyperlinks on slide one is easy:

- Put your cursor on the 'words' 'slide' and 'right click'.
- Select 'Hyperlink'.
- Select the 'place in this document' icon in the 'link to' column.
- Specify 'Slide 2'.
- Click 'OK'.

Now repeat the process for slides three and four, making the hyperlinks for each of the three icons. Once you have selected 'slide show' you can move to slides two, three or four by simply clicking the icon on slide one. Want a slicker way of moving to another page?

- Display slide one.
- Select the 'insert' menu at the top of the screen.
- Put your cursor on the 'words' 'slide' and 'right click' as before.
- At the top of the screen identify the 'links' box.
- Left-click the 'action' button.
- You can now choose the way you activate the hyperlink.
- 'Mouse click' means you 'click' it as before.
- 'Mouse over' activates the hyperlink as you move the cursor over the icon.

That sounds simple, but how do you return to the first slide? Here's how:

- Select slide two.
- Select 'insert' menu.
- Select 'shapes', then 'action buttons'.
- Choose the 'home' symbol.
- Position it on the slide (Figure 13.4 overleaf).

Once you have selected 'slide show' you can move back to the first slide [the home page] by simply clicking the 'home' icon on any slide.

Use familiar concepts

Look for opportunities to use familiar concepts or models as it makes them more memorable. For example, for recruitment courses I use the traffic-light system to show the types of questions you can use:

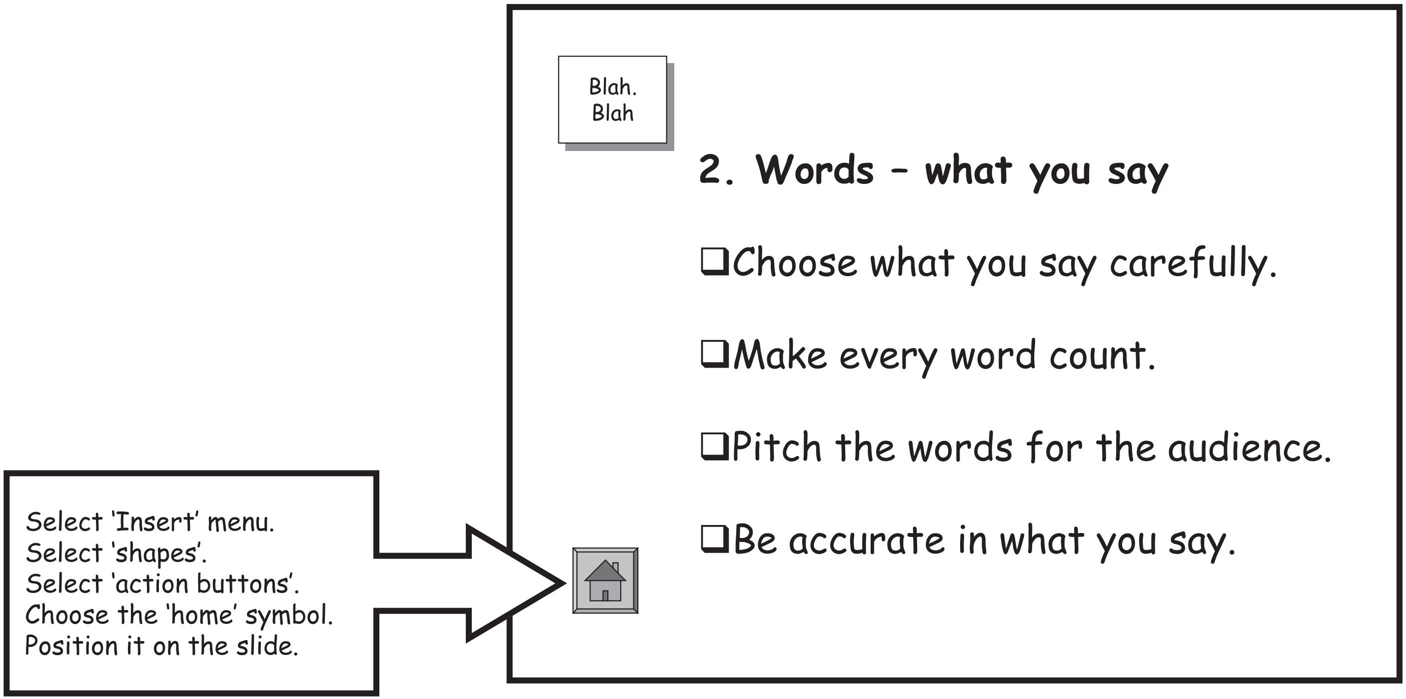


Figure 13.4 Returning to the home page

- Red light – have no place in a recruitment interview.
- Amber light – can be used with caution.
- Green light – can be used at all times (Figure 13.5 below).

7. Potential pitfalls

Too many slides

It's so easy with PowerPoint to keep adding more and more slides which, especially if they all look the same, can cause 'death by slide'. I helped one client to improve a one-day induction course which ran from 8 am to 5.30 pm and involved many individual presenters. Adding together all the proposed presentations, the screen image would have changed every 75 seconds throughout the day. How much would delegates have remembered? Not a lot!

Tailor it to the audience

I worked with another client, a civil engineering company in the water industry, to develop a team of 'account managers' from their technical engineering staff. Typically they would pitch up to a client with masses of overhead slides, models and videos and they would subject the client to a standard two-hour, non-stop, multimedia presentation. And rarely get any contracts.

My programme led them to discover a new way to influence clients. They started with an interactive session to discover the client's needs,

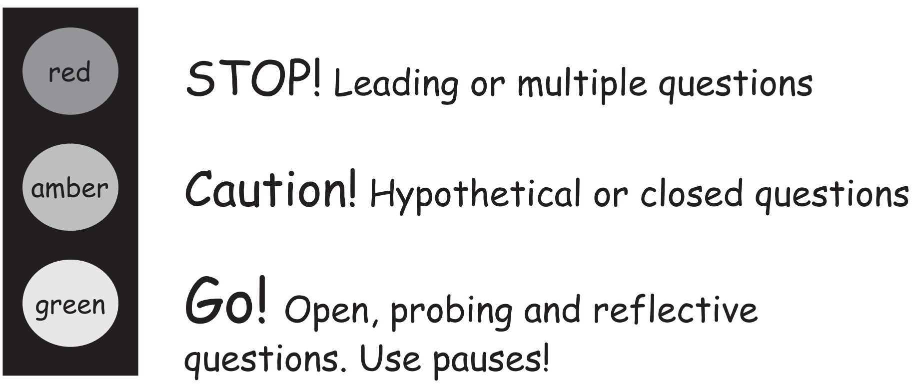


Figure 13.5 The traffic light

during which one of the presenting team was sitting at the back of the room discarding slides. They then gave a short presentation directed to the client's situation, which prompted a focused question-and-answer session. And they got new contracts!

Vary the format

Try to vary the image delegates see, especially if most people use a standard template. I remember one delegate on a presentation skills course who said: 'My problem is I'm one of a team of 13 internal auditors and we get together every quarter to share results of audits. After the third or fourth presentation people get bored looking at the same format. What can I do to make a greater impression?' I asked him for some typical findings and his last list included:

- Seventy laptop computers – no insurance cover.
- Broker's fees – halved from £20k to £10k.
- Most of our buildings are 50% underinsured.
- Our precious art collection is dramatically undervalued.

When redesigning the slides the underlying message is: 'Show rather than tell.' So here are some alternative ways you can give the same messages. Each slide shows how the image first appeared, then how it looked after some simple animation [some with sounds]:

Check spelling and calculations

This sounds so obvious but you often see glaring errors. Columns of figures that don't add up… charts and graphs which are clearly inaccurate. All it needs is one simple error to undermine people's confidence in your whole session. Here's a classic example. A delegate on a presentation skills course for a water utility company showed this slide, which claimed to illustrate the water usage for the average domestic household:

See anything wrong? First of all, the percentages don't add up to 100. Then you start to look harder. Do you really believe that a dishwasher accounts for 45 per cent of average domestic usage? But anyway the dishwasher slice of the pie looks more like 25 per cent! You can imagine what happened to the presentation – absolute bedlam! What should the percentages be? Which slices are correct? His whole credibility was destroyed simply because he hadn't checked the numbers.

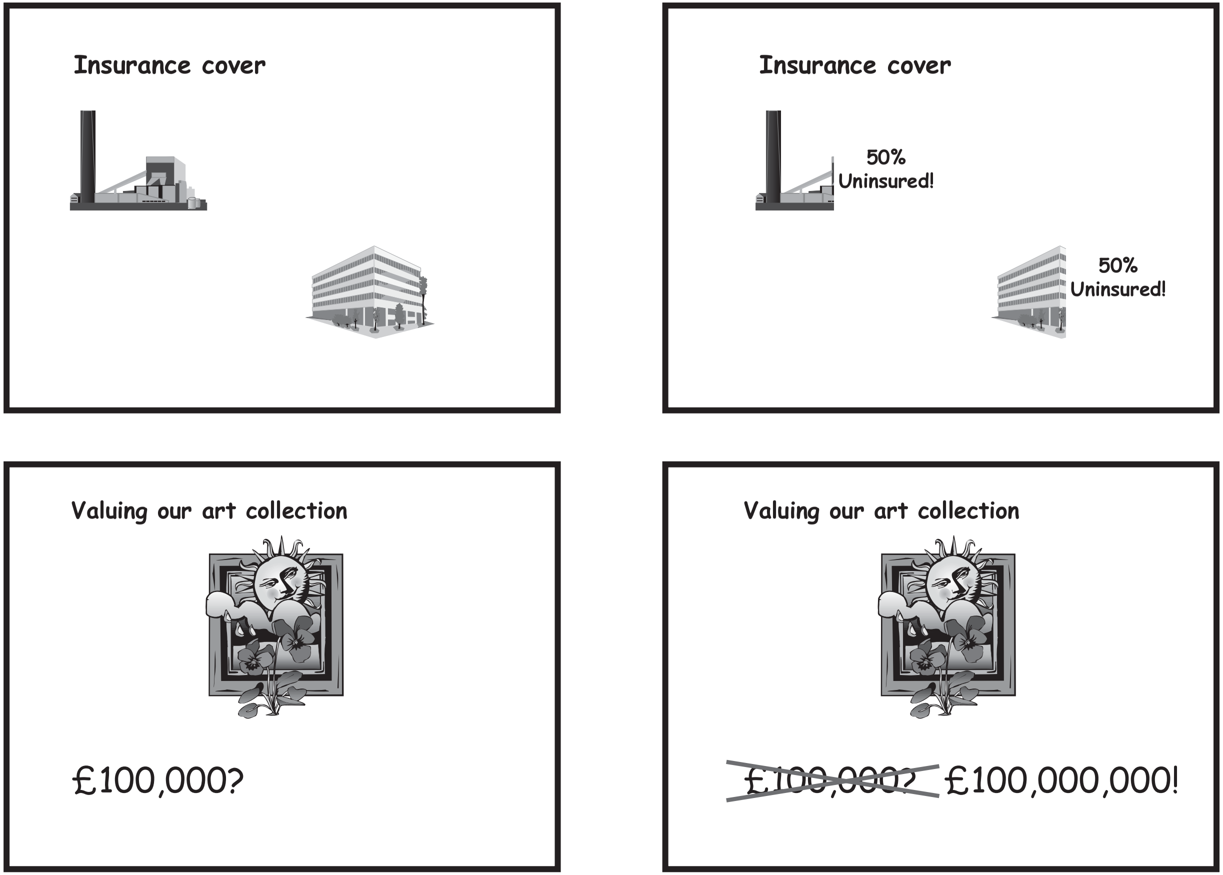


Figure 13.6 ‘Show’ don’t ‘Tell’ (continued overleaf)

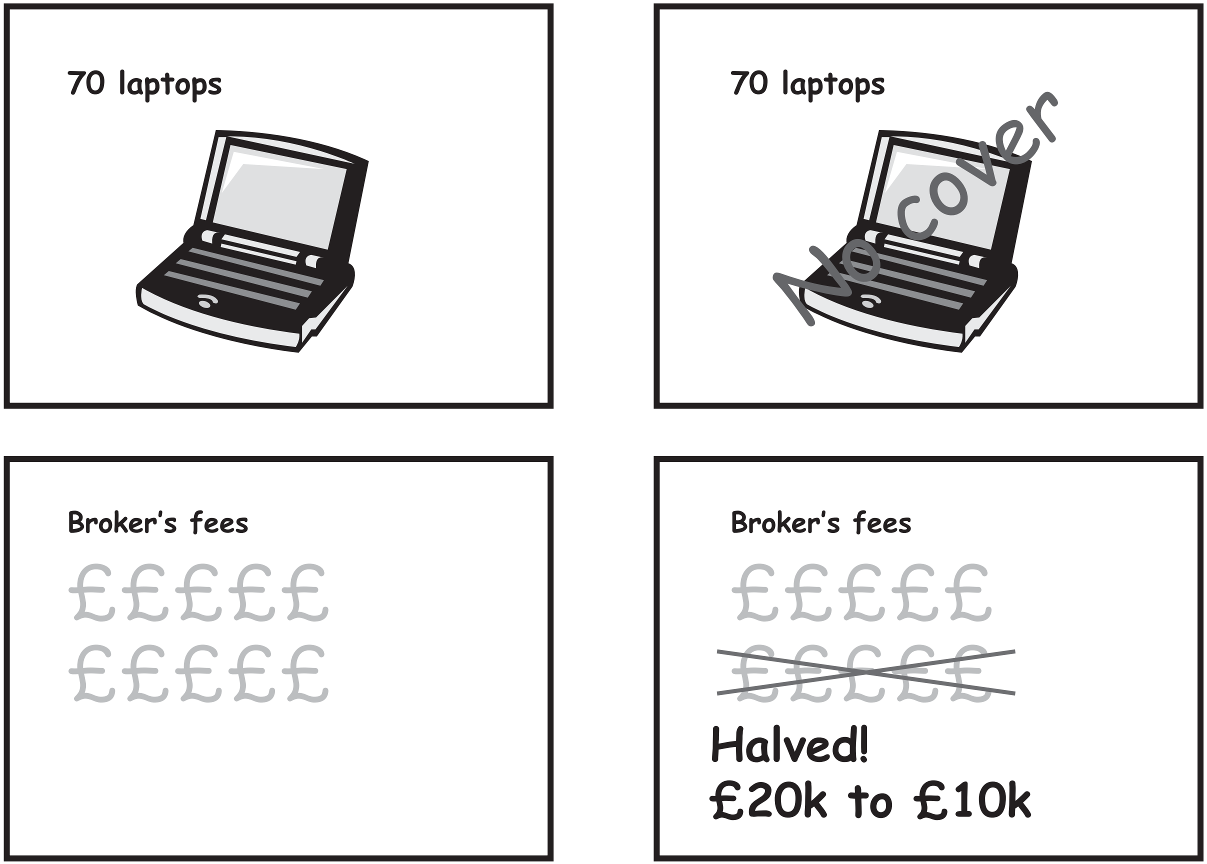


Figure 13.6 (continued)

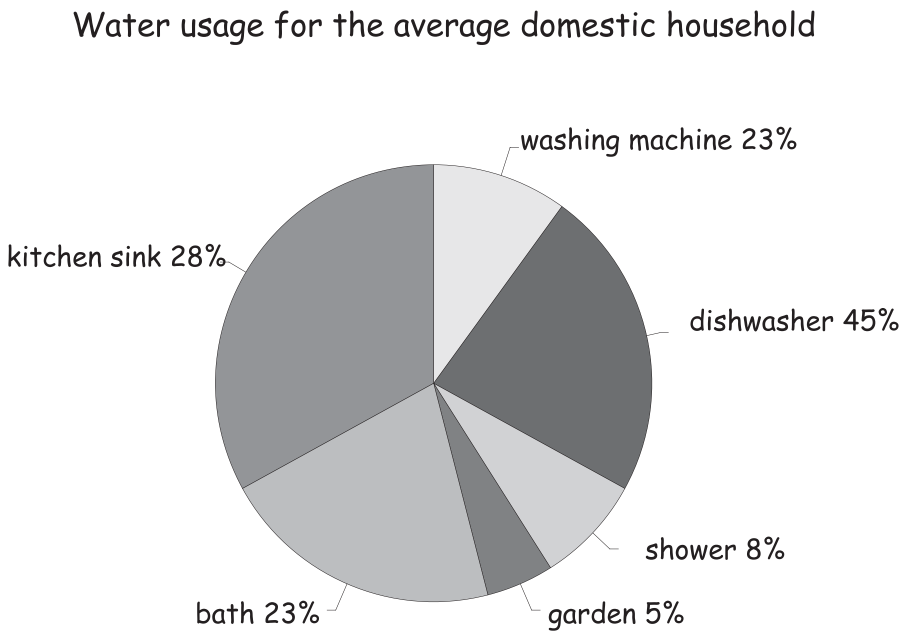


Figure 13.7 Get the numbers right

Keep it simple

Here are some more examples of poorly designed visual aids. The person who presented these thought they were excellent – and you can clearly see that many hours went into their design (Figure 13.8 overleaf).

8. Plan your visuals

So, having reviewed the guidelines for success, and also seen some poor examples, please take a few minutes to decide what you will need. There are at least three main ingredients you may be considering:

- the trainer's presentation;
- workbooks or handouts for delegates to use;
- posters, peripherals or other materials to 'dress' the training room.

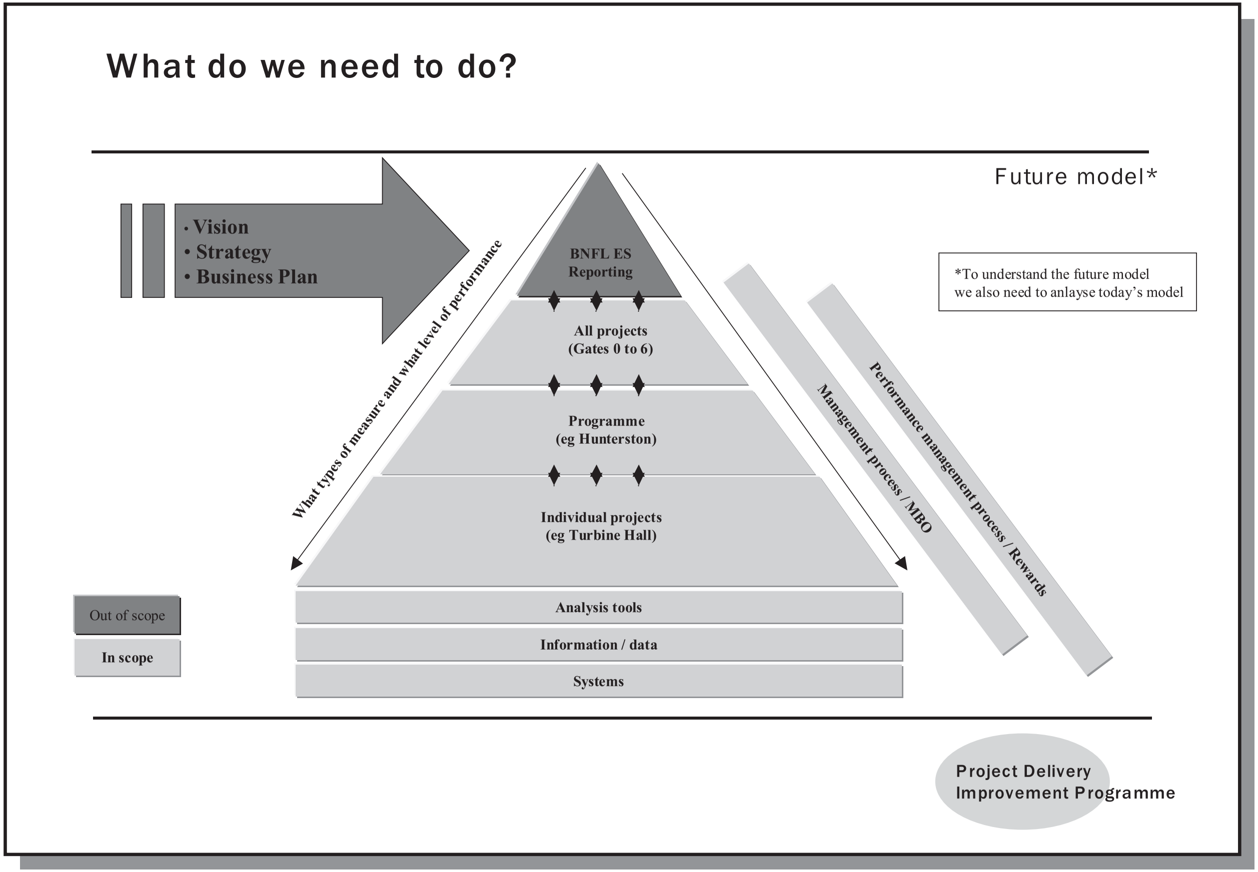


Figure 13.8 Poor visual aids (continued overleaf)

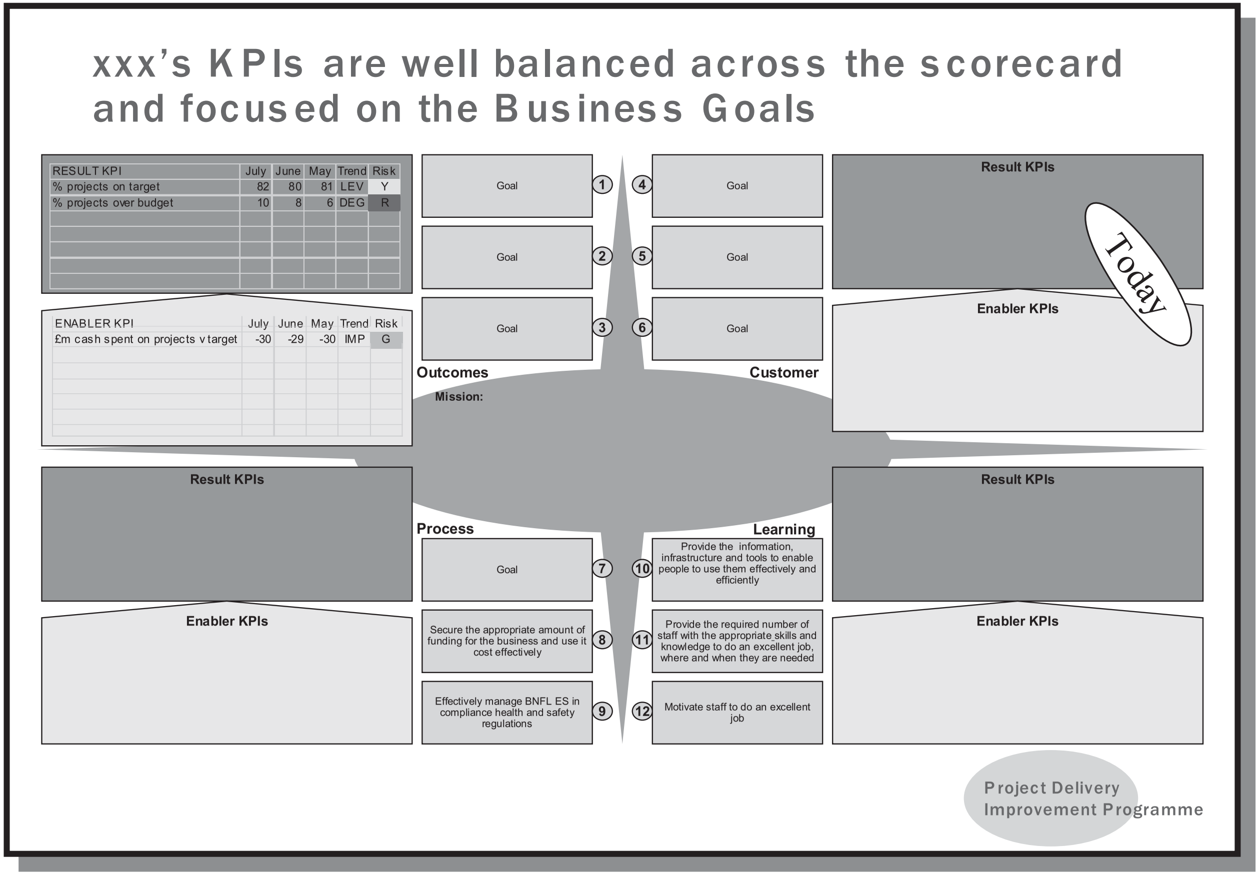


Figure 13.8 (continued)

Template S: **Structure the learning.**
Task S15: **Visual aids requirements.**
Duration: **20 minutes.**

9. Why use audio?

With the costs of shooting, editing and distributing video now much lower than they were just a few years ago, it's easy to dismiss audio as a second-rate training medium, but there are many applications for which it's still excellent. It's ideal for training staff who use telephones or radio regularly, for example receptionists, call-centre operators and the emergency services. The advantages of using audio include:

- Variety – the novelty of hearing other voices adds variety and stimulation.
- Surprise – bringing some unexpected sound into the training room can catch people's attention.
- Authenticity – the audio 'clip' means that delegates hear messages under authentic conditions.
- Accessibility – making computer-based documents accessible for people with limited vision.
- Consistency – every training group will hear exactly the same message.
- Attention – having to listen, instead of seeing, perks up your attention.
- Can be used anywhere – we can listen to audio while doing virtually anything else – walking, driving or exercising.
- Minimum equipment – with the advent of gadgets like the iPod we can carry a massive amount of audio material in a tiny package.
- Cost – designing and developing audio materials is very cost-effective, especially when compared to video.

10. Some examples

Let's share some of the ways that you can use audio which may trigger some thoughts for you.

High impact. The fund-raising manager for Scottish Opera used a novel approach when appealing to potential donor companies. Instead of using PowerPoint, Penny briefly introduced her company while a pianist settled himself at a grand piano just behind her. The pianist started playing and, at the appropriate moment, two singers who had slipped unnoticed into the room behind the delegates started singing an aria. The surprise was complete! One of the delegates described the overwhelming emotional effect of the wonderful music flowing over them. As the music stopped Penny simply said: 'That's what we do', and the donors all reached for their cheque-books!

Accessibility. Using audio is a superb way to make all computer-based materials accessible to people with poor vision.

Poor transactions. Play a recording of someone [a customer or patient] calling in for help [to a call-centre or reception desk] and getting a poor response. The delegates listen to the conversation and have to analyse what's going wrong and how it should have been handled. After the debrief it's useful to play another version which illustrates the call being handled well. This positive reinforcement of good behaviours or skills is the right way to end the session.

Case studies. Delegates are paired off – one to be the caller and the other to receive the call. You need to prepare two briefing notes which emphasize the subtle differences between the two people's situations and which simulate the tensions which are often generated in real life. For example, when I'm training telephone techniques for hospital staff one the scenarios I use is:

- Ward sister: You are working on a ward, it's the end of your shift and you're about to leave. You receive a call from a friend of a patient asking for details of their condition. The patient is terminally ill, but you have instructions not to discuss this with anyone but the immediate family, who are aware of the situation.
- The caller: You are calling the ward to find out about a patient. What the world doesn't know is that that patient is also your lover, and you have had an intimately close relationship for 10 years. You are desperate to find out about their condition, as it's not possible for you to visit them in case you meet their family.

Taking messages. Delegates listen to someone calling in with a message and they have to record the key points to pass on a message to the intended recipient. Be sneaky – have a key fact given in the last sentence, almost as a 'throw-away' remark, as, by that stage, most listeners will think they have captured all the important facts.

Ask everyone to write the message on A4 paper which they post on the wall. Ask delegates to stand by someone else's message, so that as you replay the original audio recording they can 'score' the accuracy of their colleague's message.

Improving accuracy. There are many programmes designed to improve people's ability to handle facts and information accurately and audio is used extensively. Delegates listen to a variety of information – messages, sets of numbers, names and addresses – and have to record them in the workbook. Delegates then change workbooks with their neighbour and score the results.

Learning on the move. Another excellent application for audio is learning on the move. As we said earlier, you can listen to audio while doing virtually everything else, and with modern MP3 players equipment is no longer an issue.

Extracts from commercial programmes. At times you may wish to play a short extract from commercially produced programmes to illustrate a learning point, using either serious material or something humorous.

11. Slightly different uses

Here are some other slightly different ways of using 'audio' which you might wish to consider when designing your courses.

Background music. Use appropriate music to create a mood or to change the pace of a course. One course I deliver uses a workbook developed by the Plain English Campaign and, to show what un-plain English is like, delegates have to calculate the cost of a Greek holiday from a poorly presented holiday brochure. So I always play some typically Greek music to get them in the 'holiday mood' while they're doing this first challenge.

Concert reviews. An excellent way to review what you've covered in a busy day is to ask delegates to relax, then show the series of slides you have used, without any comment but just accompanied by some gentle classical music. It gives people the opportunity to realize the range of learning points and make personal connections with the key points.

Blind walk. This is using 'audio' in a different way and is good for developing trust between delegates. Pair delegates up and ask one person from each pair to wear a blindfold. The sighted person now guides their blindfolded colleague safely on a 10-minute walk around the venue and surrounding area.

Colour blind. One superb exercise I use relies totally on 'voice communication' – it's a commercially produced product called Colour Blind.

Once all your delegates are wearing a blindfold, you place in front of each person some unusually shaped pieces from some different coloured sets. By only talking with each other the delegates have to discover which shapes you removed and what colour they are. This is an amazing experience and often reveals the most unlikely people to have the ability to solve complex problems while denied the advantage of sight.

Assemble the pieces. Another fun challenge is to sit delegates back to back, one of them facing a desk or table. The person at the desk is given a set of pieces – their partner is given a diagram which shows how the pieces fit together. Their challenge is, by using speech alone, to enable the person at the desk to fit the pieces together correctly.

12. Training kits

If you're going to be doing any significant amount of audio training it's worth investing in the equipment to make the situations as real as possible. This doesn't need to be prohibitively expensive or fixed at one site. For example, a telephone training kit which fits into a standard briefcase comprises two telephones, a cassette recorder, a control box with a loudspeaker, blank tapes and all the required leads. These kits are commercially available at sensible prices.

Place one delegate [the caller] in a room with their own briefing notes. The person receiving the call sits in a separate room, again with their own situation briefing notes, which are different from the caller's. The other

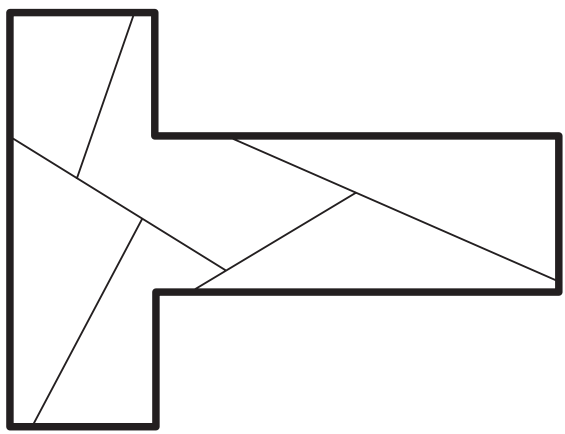


Figure 13.9 T shape

course delegates sit in the main room and monitor the conversation through the loudspeaker.

The caller starts the call, their colleague responds, while the others listen to what's happening [and the cassette recorder records the whole transaction for later replay].

This equipment is also good for recording your own audio demonstrations, for example the 'poor' and 'good' transactions we mentioned earlier.

Please take a few minutes to consider if your course would benefit from using audio and, if so, what equipment or assistance you might need.

Template S: **Structure the learning.**
Task S16: **Using audio.**
Duration: **20 minutes.**

14

Design course materials

1. Materials checklist
2. Harmonize with company standards
3. Sources for course content
4. Displaying text effectively
5. Delegate name cards or badges
6. Workbooks for trainer-led courses
7. Delegate handouts
8. Exercise briefing notes
9. Feedback sheets
10. Course peripherals
11. Sponsor ‘sign off’

1. Materials checklist

By now you have finalized the overall design of your event and designed the detailed sessions, which means that you are ready to plan and manage the development of learning materials. What will you need before, during and after the event?

Before

- Course joining instructions.
- Pre-course work or questionnaires.
- Room signs.

These items were covered in Chapter 9 Section 4 [Stimulate interest], which you may wish to refer back to if you skimmed over it.

During

- Delegate name cards or badges.
- Pre-course assessments.
- Handouts.
- Workbooks.
- Exercise briefing notes.
- Activity recording sheets.
- Feedback sheets.
- Course peripherals, for example wall posters or desk displays.
- Any special handouts or 'goodies', for example mugs or pens.
- Interim progress assessments.

Pre-course and interim course assessments were covered in Chapter 9 Section 9 [Review what's changed], which you may wish to refer back to if you skimmed over it.

After

- Post-course assessments.
- End-of-course evaluation sheets.

These items were covered in Chapter 9 Section 9 [Review what's changed], which you may wish to refer back to if you skimmed over it.

Template S: **Structure the learning.**
Task S17: **Materials checklist.**
Duration: **15 minutes.**

2. Harmonize with company standards

You must ensure that the course materials you develop are consistent with your company materials and standards. There are two separate but interlinked issues. You must:

- ensure that all the terms, processes and other content related to the topic are consistent with any existing company materials on the subject;
- research and comply with all the physical design aspects of company materials, including fonts, colours, logos, templates, etc.

You may need to contact a wide range of people in the company to see if anything they have, or are responsible for, may impinge, however slightly, on the topic you are developing. Again it is time well spent – better to change something now than when many hours of development have been committed.

3. Sources for course content

By this stage you will have identified materials you might use in your course design, or other sources you can call upon. If you still have some topics for which you don't have an immediate source, that's the next challenge – to plug those resource gaps.

- Search for subject matter experts who should have an up-to-date stock of resources or people to call on. Be certain to clarify who is going to source specific materials, when they will do it, and the format they intend to use.
- Sourcing materials can be a frustrating problem. People will offer to supply items by certain times and won't. Others may supply materials which later turn out to be outdated versions of key documents. It all wastes time and causes unnecessary frustration.
- Clarify issues such as copyright if you're relying on external people to source documents or materials.
- An excellent source is the internet – just type your topic into Google and watch the pages fill up. I was recently writing a training package and my partner suggested mentioning how a colony of monkeys developed new skills. Having explained the outline of the story she casually said 'Why not try the internet?' So I did. I typed in '100 monkeys' and was blessed with pages of stories, reference material, analysis and books. Very helpful it was too!

Template S: **Structure the learning.**
Task S18: **Resource gaps.**
Duration: **15 minutes.**

4. Displaying text effectively

Think carefully about achieving the optimum balance between text and graphics. Much will depend on the topic and the audience – some subjects lend themselves more naturally to a 'textbook' approach, having more text and fewer diagrams. Materials for most training courses for typical adult audiences will benefit from having more graphics and diagrams with less text. Designing good visuals is a subject all by itself and we have devoted this chapter totally to this topic.

Have you considered how you can display text most effectively? Any good author will tell you that it's much better to 'show rather than tell', so here goes. Please work through these examples and note how you feel as you read each one.

Justified or not?

Which style of text is easier on the eye?

Right-hand justified

We are writing to inform you that a further eyesight examination is now due, as recommended at your last consultation. Please call in or phone the practice to fix a convenient consultation time. Free examinations are still available to school children, students under 19 and those in receipt of Family Credit or Income Support. In addition, diabetics and those suffering from Glaucoma or aged over 40 and related to a Glaucoma sufferer are exempt charges. If you are not exempt then the charge for your examination will be £17.50. We hope, Ms Jones, that you will agree this is well worthwhile to ensure that your eyes are healthy and continue to perform at their best, either with or without spectacles.

Unjustified

We are writing to inform you that a further eyesight examination is now due, as recommended at your last consultation. Please call in or phone the practice to fix a convenient consultation time. Free examinations are still available to school children, students under 19 and those in receipt of Family Credit or Income Support. In addition, diabetics and those suffering from Glaucoma or aged over 40 and related to a Glaucoma sufferer are exempt charges. If you are not exempt then the charge for your examination will be £17.50. We hope, Ms Jones, that you will agree this is well worthwhile to ensure that your eyes are healthy and continue to perform at their best, either with or without spectacles.

Italic?

We are writing to inform you that a further eyesight examination is now due, as recommended at your last consultation. Please call in or phone the practice to fix a convenient consultation time. Free examinations are still available to school children, students under 19 and those in receipt of Family Credit or Income Support. In addition, diabetics and those suffering from Glaucoma or aged over 40 and related to a Glaucoma sufferer are exempt charges. If you are not exempt then the charge for your examination will be £17.50. We hope, Mr James, that you will agree this is well worthwhile to ensure that your eyes are healthy and continue to perform at their best, either with or without spectacles.

Capitals

WE ARE WRITING TO INFORM YOU THAT A FURTHER EYESIGHT EXAMINATION IS NOW DUE, AS RECOMMENDED AT YOUR LAST CONSULTATION. PLEASE CALL IN OR PHONE THE PRACTICE TO FIX A CONVENIENT CONSULTATION TIME. FREE EXAMINATIONS ARE STILL AVAILABLE TO SCHHOL CHILDREN, STUDENTS UNDER 19 AND THOSE IN RECEIPT OF FAMILY CREDIT OR INCOME SUPPORT. IN ADDITION, DIABETICS AND THOSE SUFFERING FROM GLAUCOME OR AGED OVER 45 AND RELATED TO A GLAUCOMA SUFFERER ARE EXEMPT CHARGES. IF YOU ARE NOT EXEMPT THEN THE CHARGE FOR YOUR EXAMINATON WILL BE £17.50. WE HOPE, MS JONES, THAT YOU WILL AGREE THAT THIS IS WELL WORTHWHILE TO ENSURE THAT YOUR EYES ARE HEALTHY AND CONTINUE TO PERFORM AT THEIR BEST, EITHER WITH OR WITHOUT SPECTACLES.

Bullet points

We are writing to inform you that a further eyesight examination is now due, as recommended at your last consultation. Please call in or phone the practice to fix a convenient consultation time. Free examinations are still available to:

- school children;
- students under 19;
- those in receipt of Family Credit or Income Support;
- diabetics;
- those suffering from Glaucoma;
- people aged over 40 and related to a Glaucoma sufferer.

If you are not exempt then the charge for your examination will be £17.50. We hope you will agree this is well worthwhile to ensure that your eyes are healthy and continue to perform at their best, either with or without spectacles.

Comments

Justified or not

- For many people reading unjustified text is easier, as the spacing between words remains constant, and so the eye follows the text more comfortably.
- Good typesetting practice ensures that the space between words should be less than the space between lines, or the eye may be 'fooled' and jump down a line.
- Using 'right-hand justified' makes the text look neat but, with many word processing systems, you end up with large rivers of distracting white space running through the text.
- Many people also consider that 'right-hand justified' text can look rather heavy and overwhelming compared with unjustified, especially if there's a lot of text.

Italic

- Excessive use of italic script is very hard on the eyes and most people will simply not read all of it.
- Not convinced? What was the patient's name?
- Please use italic very sparingly.

Capitals

- Most people find lots of text in capital letters challenging.
- The reason is very simple. Capital letters all look the same, whereas lower case letters are different shapes. As adults we don't read each word but scan the text and recognize the shape of the letters [which is why accurate proof reading is so difficult].
- Not convinced? Look around at public signage. On the roads, apart from HALT and STOP, all text signs are lower case. That's so that as you're driving North up the M6 and you see a sign you don't have to read B I R M I N or, crash! you'll be in the back of the car in front! Your eyes scan the sign and recognize the shape of the word 'Birmingham' instantly.
- Did you read the whole section in capitals? If so, you will have found the deliberate mistake.
- The learning point? Use capital letters very sparingly.

Using bullet points

- Having read the initial version, did you know how many categories of people are eligible for free eye examinations? Most people would have to read it several times to be able to say 'six' confidently.
- Bullet points draw your eyes to the key facts.
- Also, you feel comfortable abbreviating the text and editing out unnecessary words, so making it quicker to read.

General guidelines

To enable you to produce clear, easy-to-read documents you may wish to adopt some of these additional guidelines. But remember – they are 'tools' not 'rules'!

Font. Use a strong, simple typeface. If your company specifies Times New Roman or Arial then use it. Whenever possible I use Comic Sans, which is easy to read and looks a bit more informal. Avoid using one of the fancy font choices on your computer, as many people will find them difficult to read. Once you have chosen your font – stick to it. At most use only one other font style.

Font size. As a general rule use 12 point. Don't drop to 10 point in order to squeeze text onto one page and, if you suspect your target audience may have difficulty reading, increase the standard font to 14 point.

Paragraphs. Separate paragraphs by double line spacing and there's no need to indent new paragraphs.

Signposting. Use headings to 'signpost' the way through your documents to make it easier for people to select the sections they want to read. Use a hierarchy of heading styles to show you which sections individual pieces of text belong to.

Numbering systems. Numbering chapters, sections and paragraphs can be helpful to make it easier to refer to specific pieces of text – but keep the numbering system simple and easy to follow.

Emphasis. To emphasize a word it's best to use bold type. We've already demonstrated the drawbacks of CAPITALS and *italic* text. In general, use Underlining sparingly also. Using underlining on more than headings is very wearing on the eyes and your delegates will be tempted to skim over the text – much like you are now!

Contrasts. In general, use black text on white paper. A coloured type or background will make it harder to read and some colour combinations [red and green especially] will be very difficult for colour-blind people.

Page set-up. Aim for 25 mm margins either side of the page, and give lots of 'white space' on the page. Aim to have 8 to 12 average-length words per line, or about 70 to 80 characters [including spaces].

Template S: **Structure the learning.**
Task S19: **Design criteria.**
Duration: **15 minutes.**

5. Delegate name cards or badges

It's important for the trainer, and for other delegates, to quickly get to know each others' names and the best way to do this is to ask everyone either to have a name card in front of them or, if the course involves people moving around a lot, to wear a name badge. This can be easily designed into the 'arrival' process – delegates will probably have to 'sign in' on an attendance sheet and the trainer can ask them to write their own name on a name card. Incidentally, it's best to ask people to write their own instead of pre-preparing them from company data:

- Often the company database is incorrect and pre-printed name cards are wrong, so Carole arrives to find her name card says 'Carol'. Not a good way to start.

- People often use abbreviated names – if someone called out 'Anthony' I would look around to see where the guy is. I have been known as Tony all my adult life and I can't remember when someone last used my full name.

The only time you may find it difficult to get people to use name cards or badges is if you're designing an event for a closely knit team who all know each other. They won't see the need for cards or badges. The only advice to give the trainer is to draw a blank seating plan and, as people casually refer to each other, to surreptitiously fill in the blanks. It's also worth scribbling comments like 'blue sweater' or 'red hair' so that, when people are away from the table, you can still remember their names. Within 15 minutes or so the blanks will all be filled.

6. Workbooks for trainer-led courses

Why have a delegate workbook?

Here are some reasons:

- A good training course will actively involve delegates throughout. They may be asked to complete tasks, or to sequence lists of options, or do other interactive tasks. Of course, they can write these on scraps of paper, but there is more value if these tasks are written in a workbook, which acts as a focus.
- Delegates can also write action points in their workbook throughout the course. 'Ah Ha!' moments – those sudden realizations or moments of truth which lead towards changes in behaviour or attitude. Delegates need somewhere to write them down – or they quickly disappear.

Let's assume you've decided to have a delegate workbook – now you need to consider what it should contain.

The scope and coverage of the workbook

A workbook could potentially become very large so it's essential early on to decide the scope and coverage. You will need to be quite ruthless as there will be many types of topic competing for inclusion in the workbook.

Reinforcing key learning points

This is a powerful way to drive home the key learning points of the course, and the challenge will be deciding what to include:

- If you include too many topics the workbook becomes bulky, and may lose some of its impact.
- If, however, you exclude too many of the learning points, people may find the workbook a bit 'lightweight' or not particularly helpful.

Spaces for the learner to record the results of tests, or other activities

It's a fact that the value of a workbook, and therefore the course it's based on, improves dramatically if the delegate participates fully and writes their own thoughts, ideas or interpretation of the course materials.

So allow sufficient space for the learner to create their own course materials, within the overall structure of the workbook. As with the previous section, you need to strike a balance: using this approach too often may irritate the learner, while not using it enough loses value.

Spaces for the learner to record action points

Learning or understanding is one thing – knowing how to use the newly acquired skills or knowledge is something totally different. So the workbook should encourage the learner to write their action points as they emerge during the course. Otherwise the moment the programme ends it's quite possible that the other messages competing for the learner's attention may drown all the learning gained from attending the course or workshop.

Reinforce key company messages or initiatives

A further category competing for inclusion may be key company messages related to the topic or related initiatives. For example, a course on performance management could be used to cascade the corporate messages on mission, vision, individual accountability etc. You need to be mindful about how much of this type of information is included in both the course and the accompanying workbook:

- Too much, and it may turn learners off because of 'information overload'. They probably see the messages repeated in official documents, company newsletters etc, and so may welcome the course as somewhere they can escape from these initiatives.

- This type of information also tends to have a relatively short 'shelf life' and needs to be updated quite frequently. Modifying the workbook will be tiresome, but modifying the course, especially if delivered by e-learning, may become prohibitively expensive.

So you will need to take a broad view about how large the workbook should be, and the relative amount of space allocated to the four topics outlined above.

7. Delegate handouts

If you use separate handouts the same design considerations apply as for the workbooks, and in addition:

- Will you give delegates a file or folder to hold the handouts as the course progresses?
- If not, they may have difficulty managing all the loose sheets of paper.
- How will you distribute the handouts? At the beginning of each session or at the end?

8. Exercise briefing notes

If you are planning to use tasks, games or exercises during your course or workshop, you will need to write suitable briefing notes. All the same design considerations apply as we've covered already and, in addition, consider the following:

- Explain the task clearly and succinctly.
- What outcome or output are they expected to produce?
- Explain any 'rules' or constraints.
- Mention any supporting materials or documents.
- Outline team size and membership.
- Give timings.

We've given you some practical examples of different types of tasks online so that you can see the general approach. Remember, you may need to have briefing notes for the facilitator's eyes only!

9. Feedback sheets

Many courses require delegates to give each other feedback, for example presentation skills, so you may wish to pre-prepare some standard feedback forms. The main benefit is that it directs the observers to the issues they need to focus on, so the trainer can be more certain about the quality and relevance of the feedback that will be given.

Here's a more unusual style of feedback sheet for a team workshop, if you want people to give direct, individual feedback to their colleagues. Give everyone an A3-sized, personal feedback sheet on which they write their own name. The feedback sheet is headed 'Our gift to you' and is divided into three sections, each with its own heading:

- 'You bring to the team…'
- 'We especially value…'
- 'You might try…'

Once everyone has stuck their sheet on the wall with BluTack, start some appropriate music playing, then ask delegates to walk around the room visiting everyone's feedback sheet and write comments in any of the three sections. After about 25 minutes the activity will start to die down, so you then invite people to return to their own sheet and see what people have said about them. It's a very powerful experience for everyone, including the trainer, who also has a sheet!

Some years after using this approach in a team workshop I visited the manager, Alan Dean, and after chatting about various topics the conversation drifted round to the workshop, which had been a really significant event. Reaching into his desk drawer he pulled out his A3 feedback sheet, by now looking a bit dog-eared, and said that there were few weeks when he didn't look at it to remind himself how he needed to change.

10. Course peripherals

Much depends on the scale of the course or event and the corresponding budget you can call upon, but some of the things to consider include:

- team clothing to strengthen team identity, or reinforce the big picture;
- 'dressing' the training rooms to match the overall theme;
- daily changes to keep the venue looking fresh, or link into changing themes;
- stimulating posters and other peripherals;

- promotional videos;
- personal name badges, table name plates and country / company flags on the tables;
- headed paper for course or workshop materials with the event logo;
- notepads and binders for delegates with the event logo;
- gift items, eg pen / pencil sets, clipboards;
- course photograph;
- daily news sheets highlighting key events or activities.

Are you in control?

I once helped an internal Audit Team to develop a focused half-day course to show managers the value of internal audits. The original course design by the Audit Team was 'stodgy', with too much lecturing and theory. Delegates had typically commented: 'Half-day is too long – can't it be reduced to one hour?'

So we reworked it, making it much more participative and focused on the managers' needs. People loved it and many now said: 'Far too much material for half-day – it should be a full day!' The course theme was 'Are you in control?' and had a model based on a pyramid, much like this:

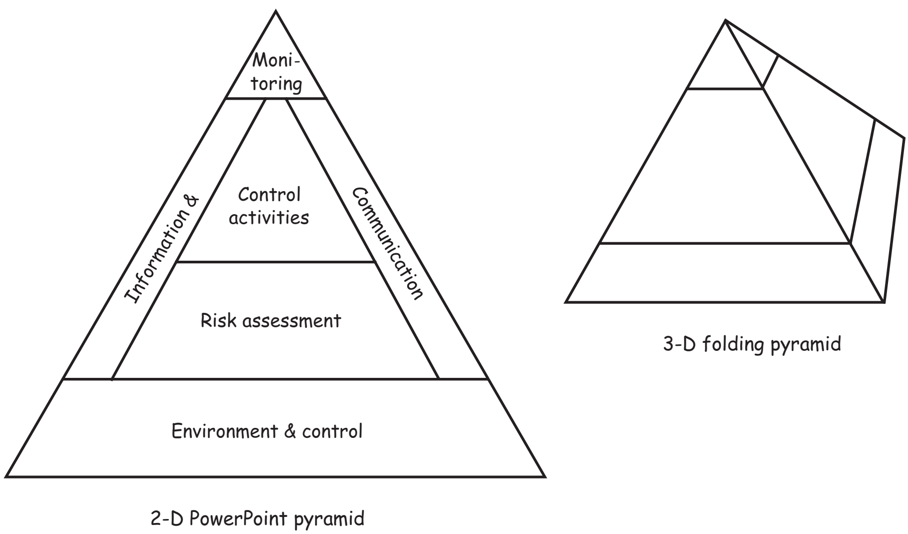


Figure 14.1 'Are you in control?' pyramid

As soon as I saw the PowerPoint slide I recognized immediately the opportunity to create a folding pyramid which delegates could take away from the course as a permanent reminder of the learning points. The pyramids were produced in sturdy, multicoloured card and given out at the end of the course, and quickly became a talking point around the company.

Jigsaw puzzle quiz

Another challenge was to design the opening session for a four-day international IT conference, which I was facilitating for a major UK company. The 80 delegates would be travelling from all over the world and we needed a high-impact way to get them working together right at the start. We had designed team-working sessions into every day so I saw this as a good opportunity to form the teams and get them working together. Each of the 10 teams was identified by one of the company's leading brands:

- So I designed a 20-question general knowledge quiz which the teams would complete, with prizes for the winning team. Then I added a twist.
- The quiz was printed on the reverse side of 10 A2-sized cards, each one bearing a team's unique brand image, and also colour coded to make it easier to identify.
- The cards were then cut into eight pieces resembling a jigsaw puzzle. So there were now ten sets of eight cards, one complete set for each team.
- Delegates were allocated to teams, blending a mixture of IT experience and geographical location within each team.
- The individual segments of each team's cards were now placed in a sealed envelope, which the delegates were given as they arrived, along with all the other conference materials.
- The envelope carried the instruction: 'Please bring this with you to the opening session. Not to be opened until instructed to do so!'
- The delegates all arrived, were given a welcoming drink and encouraged to mingle and chat with their colleagues.
- At the appropriate moment I blew a whistle to attract everyone's attention and welcomed delegates to the conference. Having stressed that the conference was a working event, I then invited everyone to rip open their envelopes and get together with their team mates, who had the seven other pieces of their team jigsaw puzzle.

- Once they had assembled the puzzle, they turned it over and then did the general knowledge quiz, prizes being awarded to the winning team.

It was a very different way of starting the conference and began the process of team-bonding right from the first moment.

Template S: **Structure the learning.**
Task S20: **Course materials.**
Duration: **15 minutes.**

11. Sponsor 'sign off'

We've stressed all the way through the importance of getting your sponsor to 'sign off' at every key stage of the design process. Before moving on, confirm that your sponsor is satisfied with the detailed design.

Template S: **Structure the learning.**
Task S21: **Sponsor's formal 'sign off'.**
Duration: **10 minutes.**

15

Select and manage the venue

1. Step I of the DESIGN model

You are now ready to embark on Step I of the DESIGN model, when you initiate a pilot course for your training programme.

Purpose

- Turn the agreed design proposal into learning products ready for testing in the pilot/test phase.

Inputs

- Agreed contracts or service agreements.
- Design resources.

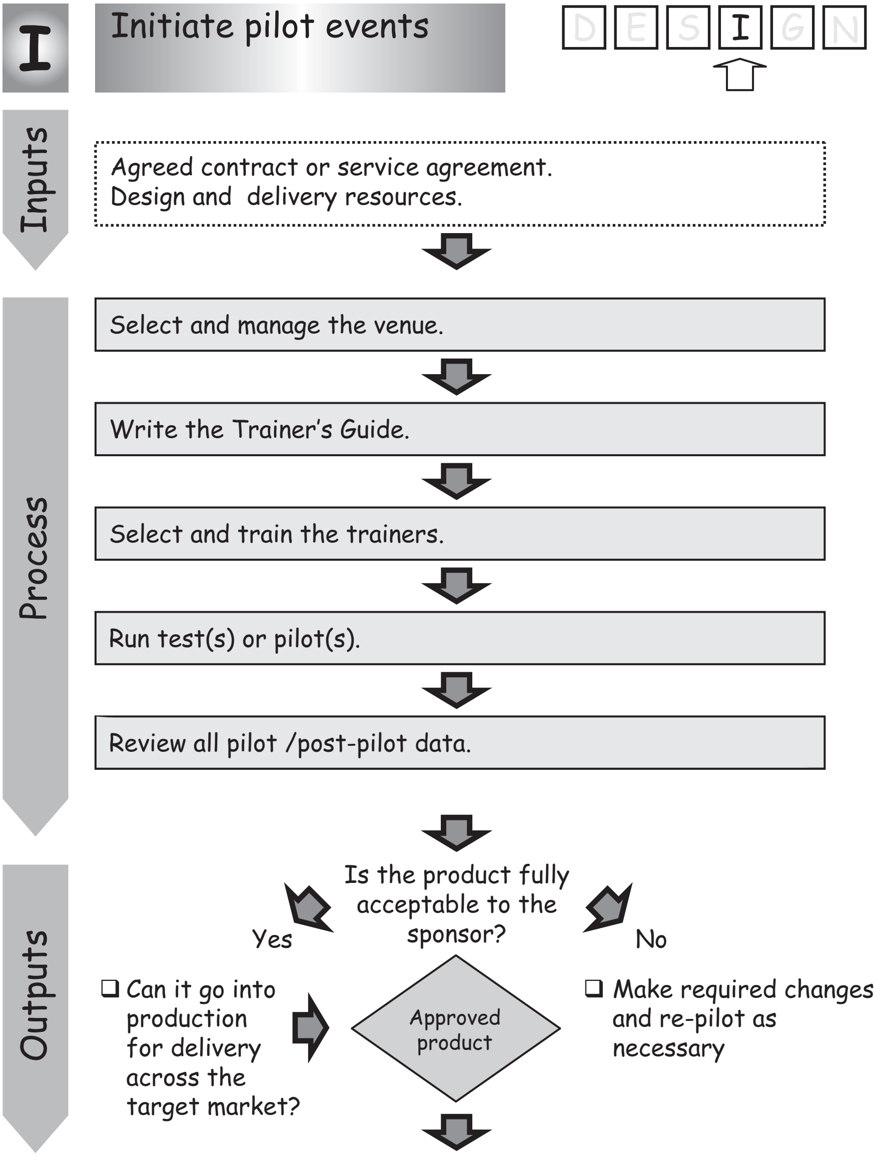


Figure 15.1 Initiate pilot events

Action

- Specify and select appropriate venues.
- Select and train the trainers.
- Run test[s] or pilot[s].
- Review all pilot/post-pilot validation data.
- Sponsor validates product.

Outputs

- Product validation.

Decision point

Is the product fully acceptable to the sponsor and can go into production for delivery across the target market?

If 'yes':

- Go ahead and make available to all operational training units.

If 'no':

- Make required changes and re-pilot as necessary.

2. Open a new template

If you are using the book to build up a complete design you will need to open a new template:

- You can access the online materials using www.koganpage.com/resources/books/TrainingDesignManual and the password is TD1917
- Find 'Template I – Initiate pilots'.
- Copy it to your drive and rename it.
- For example, if you're developing a recruitment and selection course you might rename it: 'Rec & Sel. Template I – Initiate pilots'.
- Keep the file open and, as we come to appropriate tasks in the following chapters, simply enter your ideas in the appropriate sections.

3. Draft the venue specification

Much of the success of a course relies on the venue – if the setting is wrong, or perhaps the room is cramped, then it will be an additional barrier for the trainer to overcome. An easy way to minimize the risk of this happening is to define the 'ideal' venue and use this specification when searching for the course venue. This chapter has been written on the basis that the course will be residential – clearly things will be much simpler if the course is a 'day job'.

Make sure that someone visits the venue, preferably the trainer delivering the course. To give an example of how badly this can go wrong, I arrived at a hotel which had been booked for a two-day, participative senior management workshop:

- The main room booked was the Board Room which, although looking very elegant, barely had enough room for people to squeeze behind the chairs once people were seated.
- By good fortune they had also booked two team rooms from which, although only marginally larger, we were able to strip out the furniture, leaving only the chairs around the edges of the room. No room for screens for PowerPoint – we could just squeeze in two flipchart stands.

The moral of the story – ensure that the trainer visits the venue and imagines being in the room for the course duration. Each course will be different in terms of the venue; however, the following general principles apply.

Room size

Insist on a generously sized room, as most hotels or conference centres will offer you a room which is far too small. This may be OK if you're holding a short meeting, but not for a participative, day-long training course. For a course with 12 delegates, specify a room at least 7 metres square.

Environment

Ideally your room should have natural daylight and air conditioning.

Room layout

Every trainer has their own particular preferred approach but we would recommend:

- Up to six delegates – sit around one table, board-room style.

- Seven to eight delegates – use two tables, with three or four delegates per table, café style.
- Nine to twelve delegates – use three tables, with three or four delegates per table, café style.
- Thirteen delegates upwards, use four tables, with three or four delegates per table, café style.

Supply the venue with a room plan to minimize 'misunderstandings'.

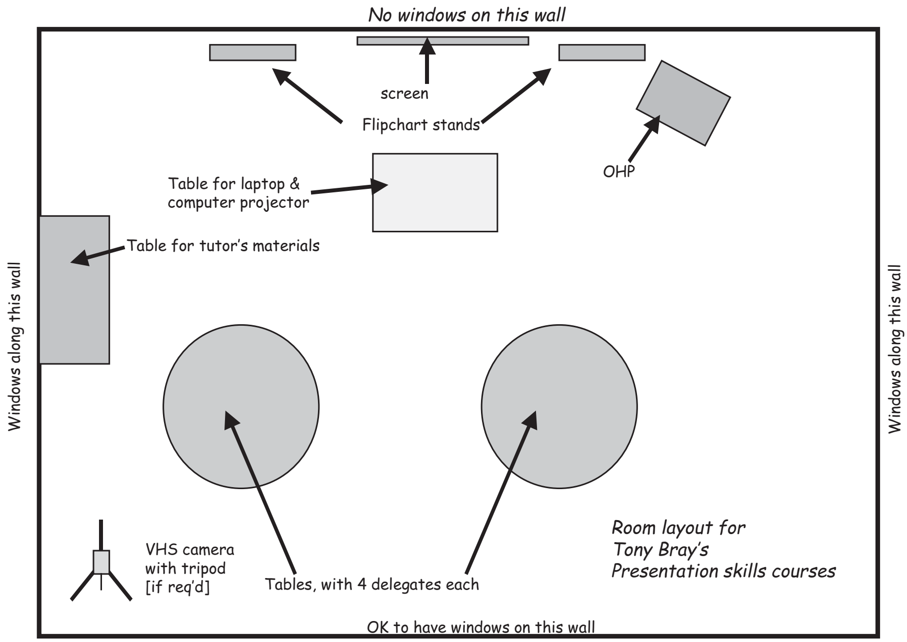


Figure 15.2 Room layout

Tutor's needs

The tutor may require a chair at the front of the room, and a side table for course materials and equipment.

Training equipment

- Sufficient free-standing flipchart stands with a good supply of flipchart paper and pens.
- An OHP projector, with a pack of blank OHP acetates and a good supply of OHP pens, together with a screen.

- If you're using PowerPoint you'll need a screen and projector – who will bring the laptop?
- Check the availability of sockets and extension cables.

Refreshments

- Ask the venue to supply water/orange juice etc, as well as tea and coffee at the formal breaks.
- Clarify catering arrangements – don't leave anything to guesswork.

4. Sample venue specification

Here's the venue specification used for a one-day, trainer-led course on presentation skills designed to enable delegates to practise the skills they had learnt from online learning.

Training rooms

We will require the following rooms:

- Two training rooms 18′ × 20′ (5.5 × 6.1 metres) minimum, each to accommodate six delegates plus one tutor.
- Two smaller viewing rooms, where delegates watch their presentations in private, after giving them. These rooms should ideally be adjacent to the two main training rooms or within 30 seconds' walk.

The two training rooms

Size: 18′ × 20′ (5.5 × 6.1 metres) minimum.

These rooms should have:

- natural daylight;
- air conditioning;
- seating for six delegates board-room style;
- a side table for course materials and equipment;
- camera and tripod;
- ideally a separate TV monitor so that you do not have to look through the camera eyepiece;
- two free-standing flipchart stands with a good supply of flipchart paper and pens;

- an OHP projector, with a pack of blank OHP acetates and a good supply of OHP pens;
- an OHP screen;
- sockets and extension cables;
- water/orange juice etc;
- pens and paper for delegates.

The video review rooms

These two rooms are used by delegates to view their own discs or tapes immediately after they have received feedback on their presentations. The rooms should each have:

- seating for two people;
- suitable replay system.

Ideally these rooms should be adjacent to the two main training rooms to minimize the time the tutors spend walking between them.

Timings

- 8 am: the trainers will arrive to prepare themselves.
- 8.30 am: tea/coffee/fruit juice available for delegates as they arrive.
- 9 am: the course starts.
- 10.15 am: morning break with tea/coffee/fruit juice available out of the rooms.
- 12.30–1.15: buffet lunch to be served out of the rooms.
- 3.15: afternoon break with tea/coffee/fruit juice available out of the rooms.
- 5 pm: the course closes.

Please take some time to draft your venue specification.

Template I: **Initiate pilots.**
Task I1: **Venue specification.**
Duration: **30 minutes.**

5. Managing the venue

Once you have selected the venue, the next challenge is to manage things for best effect. The following guidelines may give you some useful tips.

Venue management team

- Confirm names, telephone, mobile and fax numbers of key personnel in the venue management team.
- Confirm who has authority to authorize expenditure and the limits.
- Request written confirmation of the agreed programme, including the proposed rates and charges.

General venue facilities

- Confirm what the venue can provide, eg restaurants, leisure facilities.
- Collect copies of venue brochure to send to delegates.
- Confirm the broad numbers attending, dates of arrival and departure.
- Agree what will be charged to the main account, and what individual delegates will be required to pay.
- If working outside the UK, test equipment to confirm compatibility.
- Do the bedrooms or public rooms have access for e-mail or wifi?

Delegates

- Whom should delegates contact to confirm attendance?
- Confirm if delegates require smoking or non-smoking rooms.
- Confirm any special dietary requirements.
- Any special accessibility issues?
- Confirm delegate rate – what's included / excluded?
- Request venue to allocate specific rooms by [day–date–time]. [So that you may notify all delegates who's where and deliver welcome packs.]
- Programme of arrivals and departures for non-resident delegates to be finalized.
- Confirm dress code.

Support services

What support services can the venue provide?

- Typing / word processing.
- Incoming / outgoing messages. During / outside normal hours?
- Production of OHP foils.
- Photocopying – mostly routine but occasionally at very short notice.

Breakfast

- When and where available? Bearing in mind possible early-morning starts.
- Can delegates have breakfast in their room at no extra charge?

Tea and coffee breaks

- Request tea, coffee and fruit juice for all refreshment breaks.
- Is it possible to have it constantly available throughout the day, rather than at set times?
- Venue needs to be flexible about times.
- Some breaks may be served in the main room or, at other times, in syndicate rooms.

Lunch breaks

- Specify type of meal required – for example, hot / cold buffet or silver service.
- Agree when the menu is to be finalized.
- Confirm time, place and seating arrangements.

Evening meals

Normal evenings

- Specify initial requirements – subject to later confirmation.
- Menu and drinks to be agreed.
- On any evenings when delegates may be going out for dinner – can the venue suggest any local attractions?

Formal end of course event

- Pre-dinner drinks. Time, location, drinks, numbers, nibbles etc.
- Agree timings.
- Agree the menu – vegetarian alternative?
- Wines and after-dinner drinks?
- Arrangements for hosting VIP guests.
- Seating plan.
- After-dinner speaker? Selection. Briefing. Hosting. Accommodation. Departure.
- Any special 'thank you' gifts for key personnel?

Main training room

- Specify when the room is to be available and when it can be released.
- Confirm that the room is not to be used for any other activities overnight. Some venues 'sell' a room for overnight usage, and return it back to its original state by early morning.
- Agree the room layout – as per attached diagram.
- Specify types of table with numbers of delegates at each table.
- Check location and number of power points – on walls or floors?
- Audio/visual equipment:
  - What's currently available?
  - What could be ordered in from external suppliers?
- Are you aware of any unusual needs by trainers/presenters?
- Discuss decoration of the conference tables and rooms.
- Sufficient flipcharts for the main room and team rooms.
- PA equipment – button or radio mikes?
- Dressing and refreshing the training rooms throughout the day.

Other issues

- Supplies of miscellaneous stationery items.
- Pigeon holes for posting delegates' materials.
- Photographs of the conference sessions.
- Video recording of keynote speakers?
- Key venue contacts – day and night.
- Overnight security – what are the arrangements?

Syndicate/Team rooms

- Specify when the rooms are to be available and when they can be released.
- Confirm that the rooms are not to be used for any other activities overnight.
- Overnight security – what are the arrangements?
- Check that they will be large enough to seat the numbers of delegates in comfort.
- Specify any visual aids and/or computer access or facilities.

End of course arrangements

- Closing individual and overall venue accounts.
- Luggage on final morning.
- Onward travel to airports etc.
- Overnight accommodation for delayed delegates.

External presenters

- If possible, meet all available external presenters on site to discuss their sessions.
- Walk through individual session briefing notes.
- Confirm objectives, workshop requirements, outputs etc.
- Discuss specialized audio/visual/computing requirements.
- Confirm their agreement to be recorded on video [if appropriate].

Costs and accounts

- Clarify the costs associated and how they will be brought to account.
- Do you have an outline agreement or even previously agreed corporate rates for the venue concerned?
- Ask for written quotes for each aspect of the event, especially anything which may have to be subcontracted to external suppliers.

You will also need to clarify:

- What will be charged to the main account.
- To whom and in what detail the final main account should be submitted.

- Nominate individuals who have authority to commit expenditure to be charged to the main account.
- What will be charged to individual delegate's rooms, for them to pay on departure.
- Will the accounts be subject to any extra taxes? If so, how much?

Having considered managing the venue, are there any specific issues you consider might present a problem to you?

Template I: **Initiate pilots.**
Task I2: **Managing the venue.**
Duration: **20 minutes.**

16

Train the trainers

1. Sample Trainer's Guide

An important element of any training programme is to ensure consistency and, for any trainer-led course, a good starting point is to write a comprehensive Trainer's Guide, followed by some form of train-the-trainer training. To start you on the journey we've included the key extracts from a Trainer's Guide to show what you could do. We haven't given you every section as you'll quickly get the idea of what's required.

TRAINER'S GUIDE – PRESENTATION SKILLS

Contents list

Section 1 – Welcome to the course

Welcome

This package gives you all you need to deliver an effective, stimulating and enjoyable day's training.

Purpose

This course enables delegates who have completed the online Presentation Skills programme to practise their skills, and receive immediate feedback on their performance in a supportive environment. By the end of the course delegates will:

- have refreshed the concepts and techniques presented in the online course;
- have practised the skills by giving two business related presentations;
- have received focused and immediate feedback, in a supportive environment;
- leave with an action plan for immediate implementation.

The day is very busy and there is no time to cover the basic concepts so you must assume that everyone who attends the course has:

- completed all the sections of the online course;
- prepared two presentations as specified in the course joining instructions.

The course joining instructions stress the importance of this pre-course work and emphasize that, unlike conventional courses, there really is no time for theory and preparation.

Course delegates

The course has been designed for 12 delegates, facilitated by two tutors. The course operates in two parallel streams of six delegates, each with their own tutor. If you have fewer than 12 delegates we suggest the following formats:

- Eleven delegates. Two streams, one of six and the other five delegates.
- Ten delegates. Two streams, each with five delegates.
- Nine delegates. Two streams, one of five and the other four delegates.
- Eight delegates. Two streams, each with four delegates.
- Fewer than seven delegates. One stream, with one tutor. Timings will have to be massaged to fit into the day.

Venue

The venue should have the following rooms:

- two large training rooms for the group sessions, which will each accommodate six delegates and one tutor in comfort;
- two smaller viewing rooms, where delegates watch their presentations in private immediately after presenting.

You should plan to arrive at least one hour before the formal starting time of the course to give you time to rearrange any furniture, or to check the operation and settings of the equipment.

The main training rooms should have:

- seating for six delegates, board-room style;
- chair for the tutor at the front;
- a side table for course materials and equipment;
- camera with tripod and TV monitor;
- sufficient blank discs or tapes, one per delegate;
- two free-standing flipchart stands with a good supply of flipchart paper and pens;
- an OHP projector, with a pack of blank OHP acetates and a good supply of OHP pens;
- sockets and extension cables.

The video review rooms

These two rooms are used by delegates to view their own presentations immediately after they have received feedback on their presentations. The rooms should each have:

- seating for two people;
- a suitable replay system.

Materials

You will need the following materials to ensure that the course runs successfully:

- a blank tape or disc for each delegate, which they take away with them at the end of the course;
- 12 copies of the refresher quiz used early in the course to refresh key concepts, together with 12 copies of the answer sheet;

- 12 copies of a learning log;
- 24 copies of the feedback sheets, which you use to record feedback as individual presentations are made;
- stock of plain A4 paper;
- sufficient pens for each delegate.

Consistency

Prior to the course you will need to work through the complete online course so that you are fully conversant with the concepts presented. It should take you half to one day, including taking all the mastery tests.

When delivering the course it is essential that you do not deviate in any way from the concepts and ideas presented in the online version, even if you don't agree with all of them. The material has been well researched and presented and gives delegates a superb grounding in the topic.

We recognize that, as an experienced trainer, you have your own approach to this topic and it is quite possible that certain skills or behaviours may be presented differently from how you would do it yourself. However, to avoid confusing the delegates, and to ensure that the course is delivered consistently, we must ask you to:

- put aside your own personal preferences or styles and deliver the course as designed;
- respond to any questions in a way that is consistent with the online materials;
- project yourself as a role model of all the course concepts, demonstrating them consistently throughout the day.

The course

The course timetable gives the optimum balance between presentations and feedback and we ask you to follow this closely. Of course, the timings may vary by a few minutes to respond to the needs of specific delegates, but you should aim to deliver all the sessions shown as set out in the tutor guide.

The course timetable outlines the detailed sessions and gives a brief resumé of each session. Once you have run the course a few times you will probably only need to refer to this to deliver a successful course. Each session is described in a separate section of the tutor guide and the notes tell you:

- the objective for each session;
- what you and the delegates should do;
- the detailed timings;
- what materials are required.

End-of-course evaluation

Please ask your delegates to complete an end-of-course questionnaire before they leave the venue.

Any queries?

If you have any questions or queries please contact XXX.

Section 2 – Course timetable

1. Welcome
   - 15 minutes. 9.00–9.15.
2. Icebreaker presentations
   - 30 minutes. 9.15–9.45.
3. Refresher quiz
   - 30 minutes. 9.45–10.15.

Break
   - 15 minutes. 10.15–10.30.

4. Presentation One
   - 2 hours. 10.30–12.30.

Lunch
   - ¾ hour. 12.30–1.15.

5. Presentation Two
   - 1 hour 30 minutes. 1.15–2.45.

Afternoon break
   - 15 minutes. 2.45–3.00.

6. Presentation Two continued
   - 1 hour 30 minutes. 3.00–4.30.
7. Review the day
   - 30 minutes. 4.30–5.00.

1. Welcome

- Welcome delegates to the course.
- Mention that this is the second part of the learning experience and that after the course they can use the online course to consolidate their learning.
- Introduce the learning logs and the part they play in transferring learning.
- Discuss the course objectives in detail.
- Show the course outline and explain how the day works.
- Outline the domestic issues, breaks, safety and fire escapes, etc.

Timings: 15 minutes. 9.00–9.15.

2. Icebreaker presentations

- Give delegates their first challenge of the day: to give a short introductory presentation lasting 1–2 minutes and covering:
  - name;
  - type of presentation they do;
  - what they specifically want to learn;
  - hobbies;
  - their claim to fame.
- The first delegate comes out immediately, and introduces themselves to the group for a maximum of 2 minutes.
- This is repeated until all delegates have presented.
- Record each delegate on their own tape or disc, until all have presented.
- Mention that they will see their presentation later when they watch their second presentation.

Timings: 30 minutes. 9.15–9.45.

3. Refresher quiz

- Give delegates the refresher quiz, which revises the topics they covered in the online course.
- Working with a partner, they should answer as many questions as possible in 15 minutes.
- Set them going and call 'time' after 15 minutes.

- Distribute the answer sheet and ask the partnerships to score their answers.
- Then discuss any specific questions they found difficult or confusing.

Timings: 30 minutes. 9.45–10.15.

Break

Timings: 15 minutes. 10.15–10.30.

4. Presentation One

- Delegates deliver their first pre prepared 5-minute presentation.
- Delegates receive live coaching from tutor – 10 minutes maximum.
- Their presentations are recorded for later playback.
- Immediate verbal and written feedback from the group and tutor – 5 minutes.
- Delegates then leave to watch their own video in private immediately after the verbal feedback.

Timings: 2 hours. 10.30–12.30.

Lunch

- The two teams meet and enjoy an informal buffet lunch.
- Chance to network and chat about the morning.
- Delegates have time to revisit the presentation they prepared earlier in the light of the morning's feedback.

Timings: ¾ hour. 12.30–1.15.

5. Presentation Two

- Three delegates deliver their second pre prepared 5-minute presentation and 5-minute Q&A session incorporating the learning from the morning session.
- Delegates receive live coaching from tutor – maximum 15 minutes.
- Their presentations are recorded for later playback.
- Immediate verbal and written feedback from the group and tutor – 5 minutes.
- Delegates then leave to watch their own tape or disc in private immediately after the verbal feedback.

Timings: 1 hour 30 minutes. 1.15–2.45.

Afternoon break

Timings: 15 minutes. 2.45–3.00.

6. Presentation Two continued

- The final three delegates deliver their second pre prepared 5-minute presentation as outlined in paragraph 5 above.

Timings: 1 hour 30 minutes. 3.00–4.30.

7. Review the day

- Delegates review the day.
- Remind participants of the e-refresher component.
- Delegates complete end-of-course evaluation sheet.
- End on a high! Send them away rejoicing!

Timings: 30 minutes. 4.30–5.00.

Section 3 – Detailed tutor guide

Session 1 – Welcome

Introduction

This first session of the course needs to be stimulating and set the scene for the rest of the day, so deliver it in an upbeat and motivating way. Remember to set a good example of dress, confidence, and generally assured style.

Purpose

To introduce the delegates to the course and cover the usual safety, domestic and comfort issues.

What happens?

- You welcome everyone to the course, making them feel relaxed and confident.
- Start to model the characteristics of an assured, confident presenter.

Time

15 minutes. 9.00–9.15.

Materials and resources

- Two stopwatches.
- Twelve blank tapes or discs, with blank labels.
- Twelve copies of the learning log.
- Fourteen 'tent cards' for delegates' and tutors' names.
- Course overview on OHP or flipchart.
- 'Benefits of attending' OHP.
- Extra copies of the 'Presentation Objectives' sheet used during the online programme for the session on preparing a presentation.

Preparation

To prepare for the session you need to:

- ensure that the seating is right in all the training rooms;
- walk around the venue to find the nearest fire exits and toilets;
- check whether the venue is planning a test of the fire alarms;
- ensure that all your visual aids are fully operational;
- divide the delegates into two equally sized groups.

How do I do it?

Welcome delegates to the course:

- Be on hand to greet everyone personally as they arrive.
- Remember that they are probably feeling quite nervous!
- Make everyone feel welcome and introduce both tutors.
- Direct them to the appropriate training room.
- Settle people in and ask them to write their first names on the 'tent card'.

Discuss the benefits of attending the course:

- Display the 'benefits of attending' OHP and briefly discuss each one.
- Remind them that this is the second part of the learning process, and that after the course they can access the e-refresher component.
- Confirm that everyone has completed the whole of the online course.
- Stress the value of recording their presentation… it will show them that they are better than they think they are.
- On a lighter note… mention that by the day's end at least one of them will say, 'I'm going on a diet!'

Briefly explain the course outline:

- Display the 'course outline' OHP and briefly take them through the day.
- Stress the need to keep to time and return from breaks promptly.
- Emphasize that they are responsible for their own learning, so they must be searching for feedback on their performance.
- Give everyone a copy of the learning log and explain how they use it to record their own observations having viewed their three presentations.
- Check that everyone has brought their presentation materials with them. If not… it's too late to do anything about it!

Introduce the materials:

- Ask everyone to write their name on their tape or disc.
- Check that everyone has brought along their 'Presentation Objectives' sheet for their two presentations.
- If not, give them a copy and ask them to complete it during the morning break.

Outline the safety, comfort and domestic issues:

- Point out the nearest fire exits and ensure that everyone knows where to go.
- Mention any changes to the outline timings, which were given in the course joining instructions.
- Reassure them that there will be opportunities for quick 'comfort breaks' between presentations.
- Ask everyone to switch off their mobile phones.

Session 3 – Refresher quiz

Introduction

This session gives the only opportunity to discuss the theoretical concepts presented in the online course.

Purpose

- To refresh the key concepts of planning and delivering effective presentations.
- To give the opportunity to discuss any outstanding issues or concerns delegates may have.

What happens?

- Working with a partner, delegates complete a refresher quiz, which tests their knowledge about planning and delivering effective presentations.

Once everyone has finished, distribute a list of suggested answers, and then hold a short discussion on their responses to the quiz.

Time

30 minutes. 9.45–10.15.

Materials and resources

- Twelve copies of the refresher quiz and the answer document.
- OHP briefing for the session.

Preparation

To prepare for this session you need to have sufficient copies of:

- the refresher quiz;
- the suggested answers.

How do I do it?

Introduce the quiz

- Stress that you don't have time to discuss in detail the concepts presented in the online course.
- However, you'll spend the first part of the day refreshing some of the underlying concepts.
- Ask delegates to select a partner, preferably someone they've not met previously.
- Once sitting together, distribute copies of the quiz and ask them to work through all the questions.

Discussion time

- As each partnership finishes the quiz, give them copies of the suggested answers, and ask them to compare them with their responses.
- Once everyone has finished, open a general discussion on the quiz.
- Stress that the 'suggested answers' are for guidance, and that the intended audiences for their presentation are the final jury on their effectiveness.

- Be prepared to discuss any topics which seem to spark discussion, but keep an eye on the clock!
- If someone has a specific topic they obviously wish to discuss in detail, you may wish to say that you'll chat with them during the break.

Morning break

- At a suitable moment announce the morning break.
- Confirm that they must be ready to start delivering their first presentation at 10.30.

Session 4 – Presentation One

Introduction

Having got the delegates relaxed, and given them the opportunity to discuss any outstanding issues or concerns, you now get down to the core learning of the day.

Purpose

- To give every delegate the first opportunity to deliver a presentation and receive coaching and feedback.

What happens?

Each delegate delivers his or her first pre prepared presentation, which is recorded. They then receive verbal and written feedback, before watching their presentation in private.

Time: 2 hours. 10.30–12.30.

- Each delegate presents for 5 minutes, receives live coaching for 10 minutes then has 5 minutes of verbal feedback – 20 minutes of dedicated time per person.
- For all six delegates this equates to two full hours.

Materials and resources

- Camera and tripod.
- Delegates' tapes or discs.
- OHP briefing for Presentation One.
- Twelve copies of the learning log.
- Twelve copies of the trainer's feedback sheet.

How do I do it?

Getting started

Once everyone has returned from the morning break you are ready to start:

- Choose the first presenter at random.
- Reinforce the importance of completing the learning log after they have watched their presentation on video.
- Ask the first presenter to set the scene for their presentation, using the objectives sheet they were asked to complete in the course joining instructions.
- Mention that you may interrupt their presentations and give them real-time coaching to comment on specific aspects of their performance.

Delegate presentations

The first delegate delivers his/her prepared 5-minute presentation during which:

- The other delegates observe and note one piece of positive feedback, and one aspect the presenter should improve.
- You record the presentation on video/disc.
- Zoom in on specific behaviours, eg facial expressions, feet or hands, blocking the OHP screen, etc.
- When appropriate, interrupt their presentation and give them coaching on specific behaviours. Make sure you pause the recording during these coaching sections.
- Once you've finished coaching, ask them to continue the presentation (max 10 minutes total for your coaching intervention).
- Use the Trainer's feedback sheet to record key pieces of feedback.
- At 4 minutes elapsed time you should hold up a sheet of paper clearly showing '4 minutes'.
- At 5 minutes elapsed presentation time, or soon after if they are obviously coming to a close, stop the presentation and call for a round of applause.
- Be very conscious of the time available. If you allow them to run over their allotted time you will need to reduce the feedback time.
- Once they've finished, ask the presenter to sit in front of the audience.
- Leave the camera running, focused on the presenter, to record the verbal feedback and their reactions.

Feedback session

- Now lead the feedback session, using the sequence on the feedback sheet to steer the comments.
- Ask the audience to give their verbal feedback – one point they liked and one aspect to improve.
- Encourage discussion about the points made and reinforce the comments with your own feedback.
- Thank the presenter and encourage a final round of applause.
- Now stop the camera recording and remove the tape/disc.
- The presenter then selects a video cassette at random.
- Ask the person selected to prepare themselves while you're out of the room.

Off to the viewing room

- Walk the presenter to the viewing room and add your own comments and feedback as you go there.
- Once in the room, settle the delegate in front of the monitor and give them the feedback sheet you've completed.
- Pop the tape/disc in the replay system and show them how to cue it to the start of the presentation.
- Mention that they will now watch their introductory presentation as well as the business presentation they've just delivered.
- Ask them to record their reactions and learning on the learning log.
- Ensure that they know to be back in the main room within 20 minutes maximum.
- Ensure that they know to stop the video tape at the end of the final session, ie **don't rewind it!**

Next presenter please!

- Return to the main room and repeat the same process until all six delegates have delivered their initial presentation.
- Manage the time carefully so that you're ready to break for lunch at 12.30.
- Stress to everyone that they need to be ready to restart at 1.15.

Lunch 12.30–1.15

Section 4 – The course documentation

The course documentation comprises the following:

- welcome to the course;
- course timetable;
- trainer guides;
- venue specification;
- course joining instructions;
- refresher quiz and answers;
- learning log;
- trainer's feedback sheet;
- personal action plan;
- course evaluation questionnaire.

Welcome to the course

This document introduces the trainer to the course and is used early in the *train the trainer* session to give the course overview.

Course timetable

This gives the trainer suggested timings for each part of the day, together with the key steps for each session.

Trainer guides

These give detailed guidance on how to run each session to ensure a consistent standard of delivery. These are also used as the core part of the *train the trainer* session.

Venue specification

This document sets out the minimum venue requirement and ensures a consistent standard of accommodation.

Course joining instructions

Made available online to delegates to welcome them to the course and to ensure that they arrive with pre-course work all completed.

Refresher quiz

Used early in the course to refresh the key concepts of the online course.

Learning log

Used by participants to record their reactions to their presentations and record learning points during the day.

Trainer's feedback sheet

Used by the trainers to record feedback on participants during the course.

Personal action plans

Used by participants after viewing their final presentation to record their action plans for implementation after the course.

Course evaluation questionnaire

Completed by participants at the end of the course to record their feedback on the learning experience.

Section 5 – Course joining instructions for participants

Welcome

You will soon be attending the trainer-led course which will enable you to practise your presentation skills. These course joining instructions introduce you to the course and outline what you need to do prior to attending to ensure that you gain the greatest benefit.

Please note – you will not be able to enrol on this component of the programme unless you have completed the online component in full.

Benefits of the course

By the end of the course you will:

- have refreshed the concepts and techniques presented in the online component;
- have practised the skills while giving two business-related presentations;
- have received focused and immediate feedback, in a supportive environment;
- leave with an action plan for immediate implementation.

About the course

The day will be very busy, so please ensure that you arrive on time and can devote your energies entirely to the course activities. The outline timings are:

- 8.30 am: tea / coffee / fruit juice on arrival.
- 9 am: the course starts.
- 10.15 am: morning break with tea / coffee / fruit juice.
- 12.30: buffet lunch to be served.
- 3.15: afternoon break with tea / coffee / fruit juice.
- 5 pm: the course closes.

The venue

The course is being held at the XXX hotel / conference centre, in the YYY suite / rooms. The contact details for the venue are:

Phone:
Fax:
E mail:

Directions on how to travel to the venue are given separately.

Pre-course work

The day will give you the maximum opportunity to practise your presentation skills so, to make sure you get the greatest benefit from the course, you should:

- work through the whole online course no more than 1 week prior to attending;
- arrive with your two presentations fully prepared and ready to go!

Course tutors

There will be a maximum of 12 delegates on the course, although you will be working in two groups of 6 for the whole day. The tutors will be available at the venue from 8.30 and will be pleased to answer any questions you may have.

Your presentations

The real benefit of the course comes from giving presentations and receiving immediate and focused feedback, and during the day you will have the opportunity to deliver two presentations. Please prepare these presentations fully before arriving at the course, as there will be only limited time to amend your presentations on the day. Please also bring with you any supporting materials, for example OHP acetates, flipcharts, samples, etc.

Defining your objectives

During the online course you were shown how to focus on your objectives for a presentation, analysing why your audience should respond positively to you. Please complete the objectives pages for both of your presentations and bring them to the course, in order to brief the other delegates on their role during your presentations. It will make their feedback after the presentation more meaningful if they can understand what you were trying to achieve.

Presentation One – morning

- It should be on a business topic.
- Maximum duration: 5–6 minutes.
- Supported by any materials, visuals or documents as required.

Presentation Two – afternoon

- It should be on a business topic.
- Maximum duration: 5–6 minutes with a further 5 minutes for you to respond to questions from the audience.
- Supported by any materials, visuals (OHP or flipchart only) or documents as required.

Using PowerPoint

Many people now use PowerPoint to support their presentations and, if you wish to discuss the use of PowerPoint, we can give you advice and guidance on the day. However, as this course is primarily designed to give you feedback on your presentation skills, and not your mastery of computer graphics techniques, we will not have time to use PowerPoint. If you wish to use visual aids, please bring overhead slides, samples, flipcharts or other pre-prepared aids.

Dress code

Appearance and image play an important part in presenting yourself, so please dress accordingly. This will enable your audience to give you meaningful feedback on the overall impression you create.

Any queries?

If you have any queries at all please contact XXX.
Phone:
Fax:
E-mail:
We look forward to meeting you on the day.

Section 7 – Course handouts

- Refresher quiz
- Refresher quiz answers
- Learning log
- Trainer's feedback
- Personal action plan
- Course evaluation questionnaire

Refresher quiz

Please work through the following questions with a colleague and record your answers in the spaces provided. Once you have finished, we will give you the suggested answers, and then hold a short discussion on your responses.

Q1. Your presentation effectively starts when the audience first sees you. Please list three things you can do to create a powerful first impression.

1.
2.
3.

Q2. Your body language signals your confidence. How will your eyes, hands and feet complement your message?

- Eyes.
- Hands.
- Feet.

Q3. Your audience will be listening intently to your voice. List three ways you can ensure that it captivates their interest.

1.
2.
3.

Q4. A good presentation opens with four main ingredients easily remembered by the mnemonic ABCD. What are these four key elements?

- A
- B
- C
- D

Q5. You can use the following formats to structure the main body of your presentation. Which types of presentation are they most appropriate for?

- Ranked.
- Chronological.
- Spatial.
- Needs and benefits.
- Problem/Solution.
- Compare and contrast.

Q6. When using visual aids during your presentation, what guidelines must you remember?

Q7. When will you encourage your audience to ask questions?

- During?
- At the end?

Q8. When asked a question you can't answer immediately, what should you say?

Q9. What mannerisms or 'filler phrases' might distract the audience, or show them that you are nervous?

Q10. Closing your presentation successfully is important, so what will you do or say to make your presentation memorable and/or activating?

Answers to refresher quiz

Please check your own responses to the refresher quiz with these suggested answers:

Q1. Your presentation effectively starts when the audience first sees you. Please list three things you can do to create a powerful first impression.

1. Choose comfortable, appropriate clothes for the audience, which do not distract from your message.
2. Arrive early, prepare the venue and check that everything works.
3. Greet people as they arrive with a warm smile and firm handshake.

Q2. Your body language signals your confidence. How will your eyes, hands and feet complement your message?

- Eyes. Make regular eye contact with everyone, for 2 to 3 seconds.
- Hands. Use confident, open gestures.
- Feet. Make positive, relaxed movements and avoid nervous fidgeting.

Q3. Your audience will be listening intently to your voice. List three ways you can ensure that it captivates their interest.

- Pitch and tone. Ensure that your voice is varied and not monotonous.
- Pace. Speak at the right speed for your audience, varying your pace for emphasis.
- Pauses. Pauses give the audience time to reflect on what you've said, and time for you to think.

Q4. A good presentation opens with four main ingredients easily remembered by the mnemonic ABCD. What are these four key elements?

- Attention. Grab their attention fast.
- Benefits. Spell out how your presentation will benefit them.
- Credibility. Quickly establish your credibility on the topic.
- Direction. Set the direction and what you intend to achieve.

Q5. You can use the following formats to structure the main body of your presentation. Which types of presentation are they most appropriate for?

- Ranked. Good for informational talks.
- Chronological. Good for procedures and processes, and reviews of chronological steps, eg 'Here's how we arrived at this decision.'
- Spatial. Good for discussions of physical objects, places or spaces.
- Needs and benefits. Works well for sales situations.
- Problem/Solution. Use when you're trying to implement change, suggest alternatives, or encourage the audience to make a decision.
- Compare and contrast. Good for persuading, motivating, or encouraging decisions.

Q6. When using visual aids during your presentation, what guidelines must you remember?

- Plan the visual aids carefully, bearing in mind the venue seating arrangements.
- Stand well clear of the visual aids and don't obscure the view.
- Visual aids should be removed or switched off when not required.
- Distribute any handouts to cause the minimum distraction.
- Maintain eye contact with the audience and don't look back at the visual aids.
- Practise using your visual aids.

Q7. When will you encourage your audience to ask questions?

- During? Yes. It encourages participation and enables people to clarify any misunderstandings.
- At the end? Yes. It enables you to clarify any issues and to discuss any concerns the audience may have.

Q8. When asked a question you can't answer immediately, what should you say?

- Admit that you don't know the answer, and give a firm commitment on when it will be answered.

Q9. What mannerisms or 'filler phrases' might distract the audience, or show them that you are nervous?

- Stop saying 'um' or 'er' instead of pausing.
- Avoid jingling money or playing with props, eg pens.
- Avoid 'grooming' gestures, eg touching hair, face or clothes.
- Nervous, fidgety movements.

Q10. Closing your presentation successfully is important, so what will you do or say to make your presentation memorable and/or activating?

- Signal that the presentation is coming to a close.
- Briefly touch on the key messages and reinforce their benefits.
- Avoid the temptation to introduce new information.
- Link back to the opening.
- End with a specific call for action.
- Thank the audience.
- End on a motivating and/or activating note.

2. Write your Trainer's Guide

Now that you've seen the sample Trainer's Guide you can start to write your own – this is how we suggest you do it.

Brainstorm the contents

Start by brainstorming the contents of your Trainer's Guide and [surprise!] we recommend using Post-it Notes to collect your initial ideas.

Write the first draft

Once you have the ideas, assemble them into a logical order before writing the first draft. Prior to finalizing the Trainer's Guide, invite comments or suggestions from trainers who might run the courses. Get their input – it will be very helpful and starts to build their ownership for the course.

Design any extra materials you may need to use during the practical sessions – you might need the following:

- sheets for giving focused feedback;
- briefing sheets for skill practice sessions;
- case study scenarios for exercises;
- action planning sheets;
- end-of-course questionnaire.

Computer graphics

Most people now use PowerPoint to illustrate their presentations or courses, and you may wish to transfer some of the key materials for each course onto this medium. Remember to include the hardware and software requirements in your course specification.

Delivering the courses

When trainers start delivering a new course they will often need to refer to the detailed session notes in Section 3 to ensure that they cover all the key points. Then, as experience with the material grows, trainers will find that they only need to refer to the outline timetable [in Section 2] to keep themselves on track. Once they are completely familiar with a programme, an experienced trainer will be able to deliver a course confidently by simply referring to a PowerPoint presentation or the delegate workbook.

Template I:	**Initiate pilots.**
Task I3:	**Trainer's Guide.**
Duration:	**50 minutes.**

3. Train the trainers

Once you have written your Trainer's Guide, you can select and then train the trainers who will run the courses. There are two separate but interlinked issues here. First, you need to be sure that trainers are familiar with the course materials. But knowing is one thing – doing is quite another, so you may need your potential trainers to demonstrate their competence to deliver the programme. The best way to do this is to hold some form of train-the-trainer event, which we can best illustrate with some real examples.

Inexperienced trainers

A client decided to improve the customer service given by their staff at their various UK sites and that site managers would train all their staff using my Customer Care Pack as the core training materials. So we designed a two-day course which enabled the potential trainers to become familiar with the training pack, before demonstrating their ability to deliver specific sessions.

Day One

1	Welcome to the course.
2	Gain the delegates' buy in to the course.
3	Profile of the successful trainer.
4 & 5	Walk through the selected Customer Care modules.
6	How people learn.
7	Tutor demonstrates one module.
8	Brief delegates for Day Two.
9	Delegates prepare their 45-minute sessions.

Day Two

10	Welcome to Day Two.
11 & 12	Sessions delivered by delegates 1 to 4.
13 & 14	Sessions delivered by delegates 5 to 8.
15 & 16	Sessions delivered by delegates 9 to 12.
17	Other factors for success.
18	Close the course.

This programme enabled 12 delegates to explore the core training materials, deliver one session with a partner, and watch five other modules being delivered. Overall it was very successful and delegates left the course feeling confident to return to their sites and facilitate their staff to improve their customer service.

Here's another approach which can be used to build the training skills of internal trainers. In essence the training course would normally last one full day, but it is delivered over two days to allow the 'train the trainer' content to be included. The programme looks like this:

- Day One – morning. The experienced trainer delivers the first half-day of the course, observed by the apprentice trainers.
- Day One – afternoon. The course delegates return to their workplace and implement what they've learnt, while the experienced trainer walks the apprentices through the first morning's course, discussing how they would deliver it themselves.
- Day Two – morning. The experienced trainer delivers the second half-day of the course, observed by the apprentice trainers.
- Day Two – afternoon. The course delegates return to their workplace while again the experienced trainer walks the apprentices through the second morning's course, discussing how they would deliver it themselves.

Some time later, the apprentice trainers deliver the next course, observed by the experienced trainer. They use the afternoon session each day to give and receive feedback, and plan for the following day. This approach of spreading the training over two mornings also has the advantage of removing operational staff from their desks for only a half-day at a time, which often finds favour with operational managers.

More experienced trainers

If, however, you're intending to use experienced trainers who are simply unfamiliar with the course materials, you can adopt another approach:

- First, hold a short familiarization session where you simply take the trainers through the materials, session by session.
- Then ask them to sit in and observe you deliver the course, so they can see the materials 'come alive'.
- If the individuals are still feeling a little unsure of their ability to deliver the course then you can always suggest that they attend a further course, when they share the workload and deliver some sessions themselves.

Do you need to design and/or deliver any form of train-the-trainer event?

- If so, will it be for experienced or inexperienced trainers?

- Do you anticipate asking managers to deliver training sessions? If so, how will you train them?

Template I:	**Initiate pilots.**
Task I4:	**Train the trainers.**
Duration:	**30 minutes.**

17

Pilot the course

1. Plan the pilot
2. Deliver the pilot
3. Evaluate the pilot
4. Sponsor 'sign off'

1. Plan the pilot

You are now ready to pilot your programme. All the design work has been done, the key people have been involved along the journey… and it's very tempting to steam into full-scale production. But, however thorough the design work, you will be well advised to try it out on a group of 'real' delegates and see how well the course actually works. Does it deliver the promised changes in business performance?

As you enter this phase of the project, it could be helpful to discuss with the sponsor exactly what they would like to see by way of 'evidence' to convince them that the project can be safely 'signed off' at the end of this stage.

The right balance

An important issue easily overlooked is to strike the right balance of people to take part in the pilot course or courses. Make sure that you get a representative 'slice' of people across the target audience – all sites, all shifts, all grades, all countries, etc. That way you not only collect feedback which is fully representative of the whole target market, but you also retain the 'buy in' of all these key groups. The last thing you need is one site or group of staff to reject the final product because they were not involved in the pilots.

Not too many 'experts'

Sometimes it's tempting to have a mixture of delegates on the pilot, intermingling 'ordinary' delegates with people from the HR or training department. Quite naturally the 'experts' want to come along to see how the pilot works, and to be able to give their feedback during the review meeting. However, try to keep the proportion of 'experts' low, as the presence of these knowledgeable people disrupts the flow of the course. This can easily lead to the pilot course being quite different from what it would have been if the delegates were 'ordinary' operational people.

Also, because their focus is on the course itself rather than just practising the skills, they can divert the discussions towards how the course needs to be improved, instead of how individual delegates need to change their skills or behaviours.

Please take a few minutes to plan how you intend to pilot the course you've been developing.

Template I: **Initiate pilot.**
Task I5: **Planning the pilots.**
Duration: **45 minutes.**

2. Deliver the pilot

Once you've decided whom to invite then schedule and deliver the pilot course as a normal event. You want to test your design under normal operational conditions so that you know what, if anything, needs changing, so try to ensure that delegates experience an event which is as much like the final product as possible. Clearly you may have items which are expensive to produce and which you can only acquire once you know that the design is sound. This may mean that on the pilot you use some materials or equipment which are 'mock-ups' and only resemble the final production versions.

3. Evaluate the pilot

Get feedback

At the end of the course it's essential to ask individual delegates to complete an end-of-course questionnaire as you normally would. If the course lasts more than one day it's useful to do this evaluation at the end of each day while things are fresh in delegates' minds. Lots of people scoff at these forms but, if you make it clear that you do take them seriously, people will often give you constructive, and sometimes painful, feedback.

I can look back on many years of training experience and readily admit that many of the good ideas I have developed have arisen from delegate feedback. At the end of the pilot course it's also valuable to ask the delegates to give some group feedback, and you can do this very easily:

- Head up two flipcharts: one headed 'This went well' and the other 'This could be better'.
- Split the delegates into two groups, one standing at each flipchart.
- Now ask them to list on the flipchart anything they want to, relating to their heading.
- After 5 minutes or so, ask them to change flipcharts and add any extra ideas to the other one.
- Finally, ask everyone to gather round the 'This went well' flipchart and invite the 'author' of each comment to say briefly why it's important to them.
- Change flipcharts and all stand round the 'This could be better' list and again ask the 'author' of each comment to say briefly why it's important to them.

This process will give you lots of good ideas about what needs to be changed to make the pilot really effective, as well as stroking your self-esteem! Summarize the feedback and ideally e-mail to all the interested parties quickly so that everyone knows what's been said.

Schedule review meetings

If at all possible, schedule a review meeting early on the day immediately after the pilot course, so that all the key people can review what happened while it's fresh in everyone's minds. You can then decide what changes need to be made and get going on the modifications. Some of the topics for discussion could include:

- Delegates' comments and feedback.
- Trainer's comments and suggestions for improvement.
- The pace, timings, content and flow.
- Was there too much/just right/too little in the day?

Template I: **Initiate pilots.**
Task I6: **Collecting and evaluating feedback.**
Duration: **30 minutes.**

4. Sponsor 'sign off'

Time for decision! Having conducted the pilot and reviewed what changes need to be made, you must now meet the sponsor and share the results.

Is the product fully acceptable to the sponsor and can it go into production for delivery across the target market?

- If the answer is 'yes' then go ahead and make it available to all operational training units.
- If the answer is 'no' then you will need to make the required changes and re-pilot as necessary.

You can't move forward from this point until you have the sponsor's agreement, which you should get in written or e-mail form. Just in case things change later! So the final task for Template 4 is to seek the sponsor's formal agreement and have documentary evidence.

Template I: **Initiate pilots.**
Task I7: **Sponsor's formal 'sign off'.**
Duration: **10 minutes.**

18

Go live

1. Step G of the DESIGN model
2. Open a new template
3. Confirm ownership
4. Identify resources and materials
5. Market the programme
6. Deliver the programme
7. Follow-up
8. What could go wrong?

1. Step G of the DESIGN model

You are now ready to embark on Step G of the DESIGN model, when your programme goes live.

Purpose

- To move a newly designed and tested product into sustainable delivery.

Inputs

- Validated and approved training and learning products.

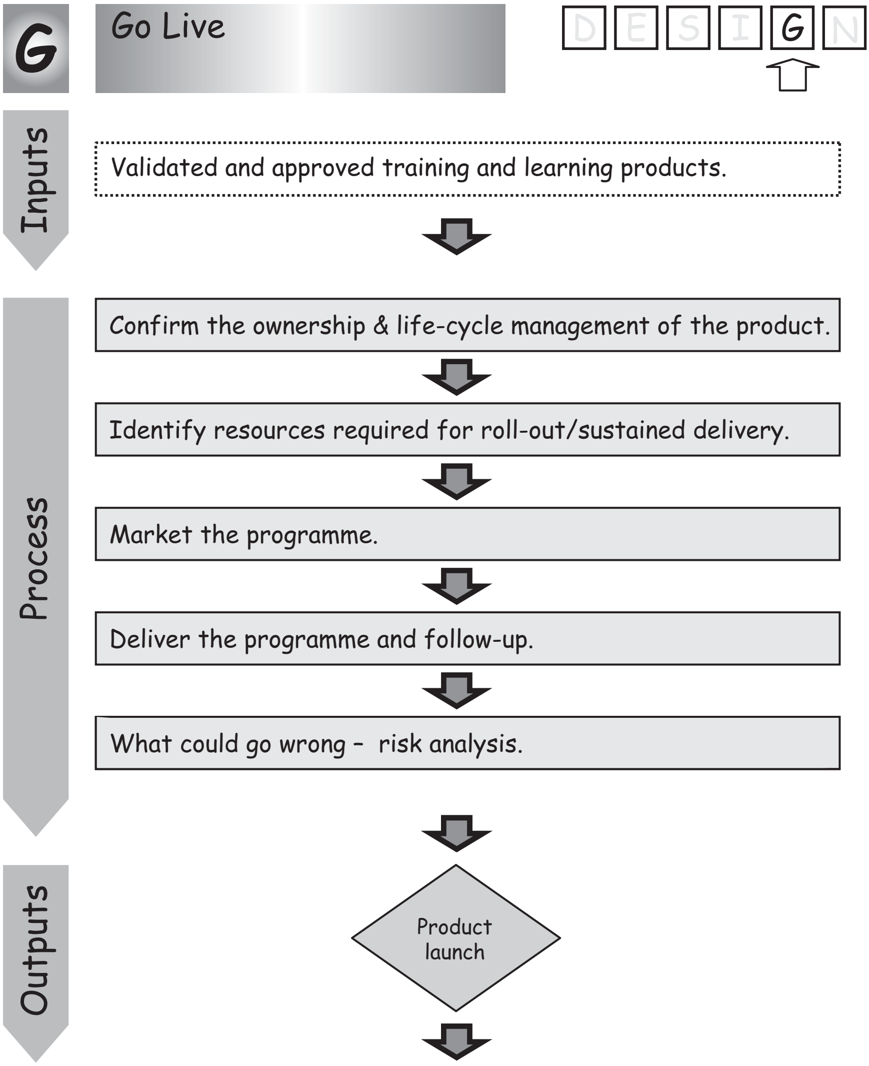


Figure 18.1 Go live

Action

- Confirm the ownership and life-cycle management of the product. Who will be responsible for it initially? Who will manage it in the longer term and make decisions about the product life-cycle?
- Identify resources required for roll-out and sustained delivery.
- Create all materials needed for roll-out and sustained delivery.

- Make the complete course available to all appropriate units and departments.

Outputs

- Complete learning and training programmes.

Decision point

- Has the life-cycle management of the product been confirmed?
- Has the transfer roll-out plan been agreed?

2. Open a new template

If you are using the book to build up a complete design you will need to open a new template:

- You can access the online materials using www.koganpage.com/resources/books/TrainingDesignManual, and the password is TD1917.
- Find 'Template G – Go live'.
- Copy it to your drive and rename it.
- For example, if you're developing a recruitment and selection course you might rename it: 'Rec & Sel. Template G – Go live'.
- Keep the file open and, as we come to appropriate tasks in this chapter, simply enter your responses in the appropriate sections.

3. Confirm ownership

You've now reached a significant step in the DESIGN process, when you move your newly designed and tested product into sustainable delivery. This can be quite an emotional time as you have to hand over what has until now been your 'baby' into the loving care of someone else. Will they treat it with the same devotion as you would like? But the first step along the route is to confirm exactly who will take on ownership of the new product and, with any luck, the sponsor will already have someone in mind.

This issue becomes more complicated if the product is to be released globally, as you may find that ownership is being delegated to individual end-market operating companies each with differing operational priorities. Only time will tell. Of course, if you're the 'product owner' life is so much easier!

Life-cycle management

Once you have confirmed ownership, you can discuss the life-cycle management of the product. In addition to clarifying who will be responsible for it initially, you will also need to discuss who will manage it in the longer term, and make decisions about the product's life-cycle:

- Some training programmes will have been developed to support a specific initiative, for example launching a new product, and so by their nature have a short life.
- Other training programmes will have been designed to develop mainstream skills and so can be expected to have a longer 'shelf life'.
- The final category is the programmes which can be expected to last for a longer period because they deal with less 'volatile' topics, such as meetings skills, or have involved considerable expense, for example e-learning.

The important aspect here is to ensure that someone takes specific responsibility for monitoring the effectiveness and condition of each of the training programmes to ensure that they are all delivering what was expected of them.

4. Identify resources and materials

You can now hold meaningful discussions with the new owner about how they will roll out the product into sustained delivery. Administration and logistics will feature large in the discussions:

- How many delegates are to be trained in the given timescale?
- How many courses need to be delivered – do they have sufficient trainers and suitable venues?
- How do they want the product transferred? Hard-copy or electronic, or a mixture of the two?
- Will you need to supply any supporting equipment or materials, for example delegates' folders, posters or video tapes?
- Will materials be sourced centrally [giving economies of scale] or locally [giving increased flexibility]?

This sounds very mundane yet is vitally important for the success of the programme. It doesn't matter how brilliant the original course design was if the delegates can't fit their handouts into the flash 'high impact' delegate folder. If a training programme has to be implemented within a specific 'window', for example to launch a new product, then it's so easy for people to underestimate the sheer scale of the administration required. Courses won't run full – you generally have 'no shows' and they can't always be shoehorned into the remaining courses without adversely affecting the learning experience.

So insist on getting the administration well planned or there may be a disaster. And you can guess who they'll blame – yes, that's right, the course designer!

Please look ahead and consider these life-cycle ownership issues.

Template G:	**Go live.**
Task G1:	**Life-cycle ownership.**
Duration:	**20 minutes.**

5. Market the programme

Never too soon to close

Having organized the programme, all that remains is to make the complete course available to all appropriate units and departments. Sounds easy, doesn't it, but we all know that there's a lot to effective marketing. Take a tip from a salesperson's toolkit – *it's never too soon to close a sale*. So from the moment you start the DESIGN process, always be looking to talk about what you're doing and winning people over.

Throughout the design process it's worth putting some energy into raising people's awareness of the new training programme and, especially if you're introducing e-learning, overcoming the very natural reluctance many people may have. Developing a strategy for 'selling' your programme into the business will be easier if you've actively involved managers and users throughout the design process.

If you're promoting a combination of e-learning with a shorter trainer-led course, you must expect that some people may need some encouragement to embrace it willingly. Consider internal magazines, newsletters, the company intranet, and notice boards. Also be aware of when managers will be discussing annual appraisals, so that e-learning becomes one of the possible development options.

Template G: **Go live.**
Task G2: **Marketing the programme.**
Duration: **20 minutes.**

6. Deliver the programme

Select the venue

Using the criteria in the draft venue specification, select a suitable venue and confirm the date. Don't skimp on the venue – it's a key ingredient for success. There's nothing more demotivating than being cooped up all day with a group of people in a claustrophobically small room. It can undermine everything that's gone before.

- It sounds obvious but, whenever possible, visit the venue in advance to ensure that it really does meet your needs.
- At the very least, ask the venue to send you a detailed room plan showing measurements and the locations of windows, doors and power sockets.
- Look for any built-in [and unmovable] training aids, eg screens for projectors and wall-mounted flipchart stands.
- Check out the size and location of any syndicate rooms you want.

Lead-times on venues can be quite long, and coming to an understanding relationship with nearby conference and training venues can relieve lots of pressure. The ideal would be to have dates 'pencilled in' but leaving you free to cancel if the numbers of delegates are insufficient to run the courses as scheduled.

Collect nominations for the courses

So the marketing's under way and people are showing an interest in the course. Review the wait-list and schedule an event once minimum numbers have been reached. This sounds easier than it often is in reality!

- You reach the minimum number count and seek a venue.
- They give you a date which you test out with your delegates – and find that not all can attend that day.
- You ask when they could attend, so you check out that date with the venue.
- Only they are fully booked that day!

And so it goes on! But eventually you will find a date when your delegates can attend, the venue has a suitable room… and the trainer is free! Obviously a key element in managing this whole process is having a database which allows you to easily monitor potential delegates and their availability.

Issue course joining instructions

The course joining instructions may be your first formal contact with your delegates, so they need to be:

- Timely. Far enough in advance to give reasonable warning, but not so far that people lose them.
- Complete. Make sure you include all the information people need.
- Accurate. It's easy to get addresses or telephone numbers confused.
- Inviting. Make them look exciting and stimulate interest.

You probably have your own format – however, you may wish to look at the example we've given in Chapter 9. Ask delegates to confirm attendance and monitor the take-up to ensure that the minimum numbers are met. Let's briefly go through the main elements.

Welcome

- Welcome the delegates to the course.
- Outline what needs to be done prior to attending.
- Stress that attending is conditional upon completing the full e-learning component [if appropriate].

Benefits of the course

- Tell the delegates how they can expect to benefit by attending.

About the course

- Stress the need to arrive on time and give full commitment.
- Ask for mobile phones to be switched off for the whole day.
- Give outline timings.

The venue

- Give full details of the venue.
- Contact person's details at the venue.

- Directions on how to travel to the venue.
- Parking, security, refreshments, lunch etc.

Pre-course work

- Detail any pre-course work.

Course tutor

- Say when the tutor will be available at the venue.
- And that they welcome any questions delegates may have.

Dress code

- State the dress code for the course, normally smart casual.

Can't attend?

- Stress the need to give maximum notice if they can't attend so that the place can be offered to another delegate.

Any queries?

- Offer a contact if the delegate has any queries.

Sign off

- Sign off in a friendly way – 'We look forward to meeting you on the day.'
- With a name people can read.

Pre-course preparation

Just before the scheduled date, send course materials and equipment to the venue, clearly labelled for the trainer, with the name of the training room and date. The times I have spent frantic minutes on the morning of the course searching hotels for a box of materials!

- Finalize the administrative details with the venue managers.
- Confirm the number of delegates and trainers, timings and any special dietary requirements.

- Finally, confirm the date and venue with the trainer[s], together with travel directions and the name of the training room.

Template G: **Go live.**
Task G3: **Delivering the programme.**
Duration: **20 minutes.**

7. Follow-up

Assess learners' improved skills and effectiveness

We started this journey looking at the three phases people work through to improve their skills or confidence:

- *Grasp the theory*. Delegates may undertake a self-study e-learning course, supported by other learning resources, for example books or videos.
- *Practise the skills*. Learners come together with colleagues to practise their skills in a trainer-led course.
- *Apply the learning*. They apply all the learning to reach new levels of business performance, supported by coaching.

Delegates will return to their workplace after attending any trainer-led course and begin to implement their action plans. This is a potential danger period as they may get swamped by 'business as usual' when they return to their desks, and it's quite possible that all their good intentions from the course get lost!

In an ideal world each delegate will have discussed the outcome from the course with their line-manager who will, of course, show an interest in their action plans. It's vital that the action points that learners develop as they both Grasp the theory and Practise the skills are SMART in every way:

- **Specific** – they identify specific tasks or activities to focus on.
- **Measurable** – if they can't measure it, they won't know how well they're currently doing and, worse still, they won't know when they've met the new standard.
- **Achievable** – a balance is required here. A too easy goal is no motivation, while one that's unattainable is an immediate turn-off.

- **Relevant** – both the learner and line-manager must see the objective as relevant to the job in hand.
- **Timely** – give it a date and time – and you have something real to achieve.

It will be important to develop some meaningful measurements to really determine the true improvement in individual skills or behaviours, especially if you want to compare changes across different parts of the business, or at different sites.

Offer coaching to reinforce learning

The line manager needs to discreetly monitor the learner's progress against the action plans written at the end of the *Practise The Skills* course. Depending on their response they might need coaching, which can be given in at least two ways:

- The traditional method, when the line manager sits with the learner and gives one-to-one coaching on specific skills or behaviours.
- Online coaching, when the trainer who delivered the trainer-led course offers remote coaching via the internet or the company intranet.

Whichever approach is adopted, you must ensure that delegates get every bit of help and encouragement to implement their action plans. One additional advantage of the second approach is that the central HR department has a continuing relationship with people who have passed through the e-learning system, so enabling them to monitor its ongoing effectiveness more realistically.

Online coaching

If online coaching is an option, it needs to be mentioned at each stage of the process to reinforce its value to learners and to ensure a reasonable take-up of the service. Online coaching is quite different from the normal form of coaching and, to be successful, there are some additional elements to be taken into account:

- Ideally the online coach needs to have been involved in the trainer-led course so that they have seen the individual 'in action'.
- The online coach needs to have a copy of the action plan completed at the end of the trainer-led course, and be brought up to date with progress by the learner.

- It will be important to specify the maximum amount of online coaching that the individual will receive, perhaps 8 hours.
- It's useful to give a commitment about response time, for example: *To contact your personal coach, send an e-mail with your particular question to coach@XXX.com. We will normally respond within 1 working day, although we endeavour to reply within a few hours.*

It's also worth considering establishing a form of automated follow-up whereby the learner receives a series of reminder messages at specified periods after attending the trainer-led course. The various forms the messages could take include:

- top tips;
- frequently asked questions;
- action plan reminders.

Template G: **Go live.**
Task G4: **Follow-up.**
Duration: **15 minutes.**

8. What could go wrong?

Rolling the programme out for wider distribution, especially if it involves other people, as it inevitably will, means that there are plenty of opportunities for things to go wrong. But with a bit of forethought it's possible to counteract many of these potential problems. To close this chapter we'll invite you to do some risk analysis. First of all, let's walk through the process step by step (Figure 18.2 opposite).

Step One – Play Devil's advocate

Put on the Black Hat and imagine everything that could go wrong. This is difficult for a natural optimist [like me] but very important to do.

Step Two – Assess the risk

Assess the risk of each potential problem happening. Rate each potential risk using a score of 1 to 5, using the following categories, then enter the results on the second column.

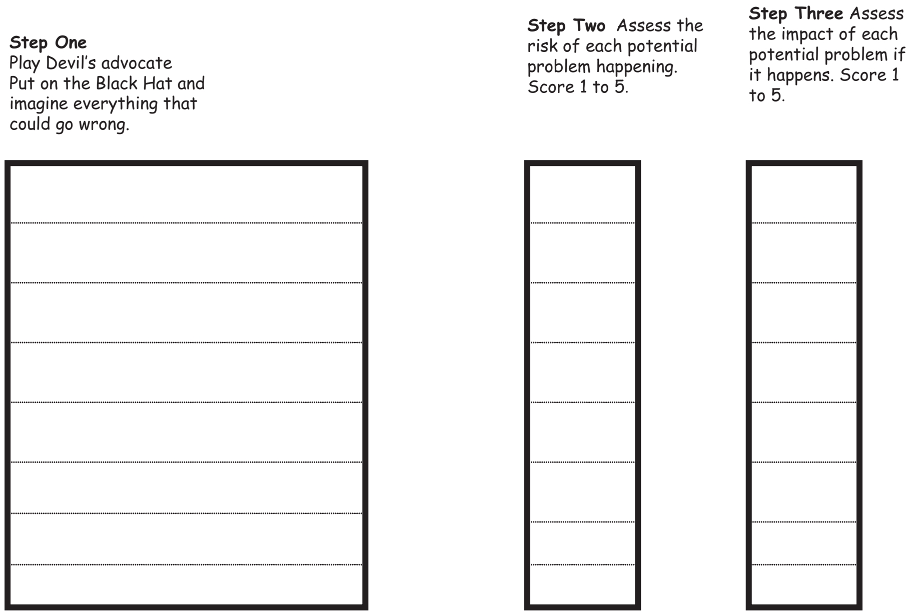


Figure 18.2 Risk analysis

5 – Almost certain
4 – Likely
3 – Possible
2 – Unlikely
1 – Rare

Step Three – Assess the impact

Next, assess the impact of each potential problem if it happens. Rate each potential risk using a score of 1 to 5, using the following categories. Then enter the results in the third column.

5 – Catastrophic
4 – Major
3 – Moderate
2 – Minor
1 – Insignificant

Step Four – Evaluate the results

Now multiply the score for column two [risk of an event happening] by the score for column three [impact if it occurs] to arrive at an overall risk assessment for each risk. Use the following risk chart and plot the potential problems in the appropriate boxes:

Step Four

To evaluate the probable mitigation required for the identified risks, use the following risk chart.

Impact if it occurs / Risk of occurring	1	2	3	4	5
5	5 Recover	10 Recover	15 Recover	20 Avoid	25 Avoid
4	4 Absorb	8 Recover	12 Recover	16 Recover	20 Avoid
3	3 Absorb	6 Recover	9 Recover	12 Recover	15 Recover
2	2 Absorb	4 Absorb	6 Recover	8 Recover	10 Recover
1	1 Absorb	2 Absorb	3 Absorb	4 Absorb	5 Recover

Figure 18.3 Risk analysis

Having calculated the numbers, how do you proceed? There are four main approaches you can adopt:

- terminate;
- transfer;
- treat;
- tolerate.

Terminate

Potential problems which score 25 to 20 present serious risks and, if you can't reduce them significantly, you might conclude that the risks are too high to continue and stop it altogether.

Transfer

Another valid approach is to transfer the risk to another organization, or someone else who is prepared to accept the risk on your behalf. Examples of this approach include outsourcing and taking out insurance in the risk.

Treat

Is it possible to minimize the risk by changing the work process, the raw materials, changing suppliers, or upgrading the specification?

Tolerate

For many low-scoring risks the most appropriate action is to develop rugged contingency plans which can be implemented if and when the risk appears.

So, having grasped the theory, now it's time for you to apply the learning and see how it works for the course you've been designing.

Template G: **Go live.**
Task G5: **Risk analysis.**
Duration: **15 minutes.**

19

Review and re-launch

1. Step N of the DESIGN model
2. Open a new template
3. Review what's changed
4. Sources of feedback
5. Measuring wider business impact
6. Time for decision

1. Step N of the DESIGN model

You are now ready to embark on Step N of the DESIGN model, when you review, and if appropriate, re-launch your training programme. It's important to note that, although the review and re-launch step is the last in the cycle, you need to be working on this aspect throughout the whole design process. If you are always considering how you will measure the output from the programme, by the time you get to the end you will have produced some meaningful and workable measures.

Purpose

- Review the continued relevance and effectiveness of the learning/training programme, and modify as appropriate.

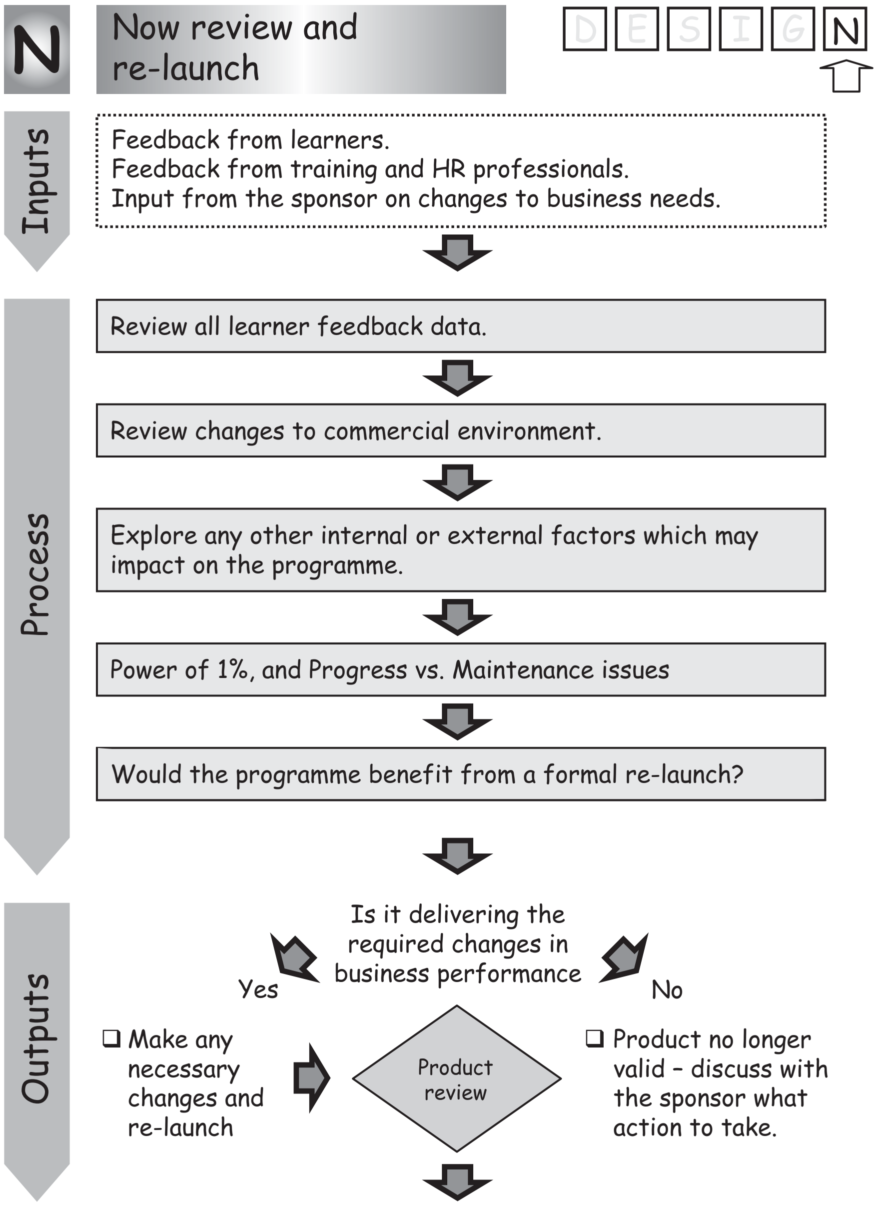


Figure 19.1 Now review and re-launch

Inputs

- Feedback from learners.
- Feedback from training and HR professionals.
- Input from the sponsor on changes to business needs.

Action

- Review all learner feedback, and also feedback from training and HR professionals. Does it suggest that any changes are required to the programme?
- Review current or projected changes to commercial environment – does anything impact on the overall programme?
- Are there any other internal/external factors which may impact on the programme?
- Would the programme benefit from a formal re-launch?

Outputs

- Balanced review of the current state of the product, supported by factual and anecdotal evidence.

Decision point

- Is the product still acceptable to the sponsor?
- Is it delivering the required changes in business performance?
- Are there any other markets globally where it might be required?

If 'yes':

- Then consider re-launching the product to retain staff awareness of it.
- Market the product more energetically using all internal communications media, focusing on benefits and sustained improvements to business performance.

If 'no' then react appropriately:

- If the product is still valid but in need of updating or a 'makeover' – then make the necessary changes and re-launch.
- If the product is no longer valid, discuss with the sponsor what action to take.

2. Open a new template

If you are using the book to build up a complete design you will need to open a new template:

- You can access the online materials using www.koganpage.com/resources/books/TrainingDesignManual, and the password is TD1917
- Find 'Template N – Now review and re-launch'.
- Copy it to your drive and rename it.
- For example, if you're developing a recruitment and selection course you might rename it: 'Rec & Sel. Template N – Review and re-launch'.
- Keep the file open and, as we come to appropriate tasks in this and the following chapter, simply enter your responses in the appropriate sections.

3. Review what's changed

So now you've reached the final step of the DESIGN model, when you review the continued relevance and effectiveness of your learning and/or training programme, and decide its longer-term future. In practice this validation needs to be a continuous activity, enabling you to report back with confidence to the stakeholders on the success of the venture. If the expected level of performance is not being delivered you can modify the training programme accordingly.

When I first became involved in quality management systems, I was amazed by the huge manuals that always seemed to accompany the workshops. Overcome by the sheer volume of material I was expected to absorb, I asked one of the experts what the underlying principles were. The expert said that any good quality management system had essentially three main components:

- *Say what you do.* Write a clear, simple statement of exactly what you intend to deliver or produce.
- *Do what you say.* Put in place the people, equipment, materials, tools, training and other resources to enable you to do what you've said you would do.
- *Prove it.* Take consistent and reliable measures which prove that you do what you said you would do – first time, every time.

So once people have completed any parts of the formal training programme and have applied their skills, perhaps having received some coaching along the way, you can look back and confirm what's actually changed. This review process is essential, not only for the specific course you've been developing so that you can change or tweak parts to make it even more effective, but also in the future as you develop other courses or workshops.

4. Sources of feedback

There's a wide range of feedback you can collect to help you carry out a balanced review of the training course or programme, to ensure that your final conclusions are supported by both factual and anecdotal evidence:

- Review all the feedback you have collected from learners, for both trainer-led and self-study courses, together with feedback from training and HR professionals. Does it suggest that any changes are required to the programme?
- Review current or projected changes to the commercial environment – does anything impact on the overall programme?
- Are there any other internal/external factors which may impact on the programme? For example, input from the sponsor on changes to business needs.
- Even if the contents are sound, could the programme benefit from a formal re-launch to reactivate interest in the target market?

5. Measuring wider business impact

Customer–supplier surveys

Measuring the wider impact of training programmes across the business can be more difficult because other factors come into play. For example, if the company had 'sheep dipped' everybody in a series of customer-focus workshops, followed up by specific project-based work designed to improve product delivery, one would think that by a comprehensive series of 'before' and 'after' customer surveys you would be able to show the success of the programme.

Given general market stability that should be the case, but then other factors come into play. Market forces affect the way that companies operate, and improvements in customer service could be swamped by sudden changes in fuel costs, new legislation, 'credit crunches', raw materials, wars, mergers and takeovers. However, proving the longer-term value of training can still be done by these 'before' and 'after' surveys – you just have to recognize the potential pitfalls:

- External surveys of customers and suppliers done over a period of time will reveal trends, which could be the results of training initiatives.
- Similarly, internal staff surveys done at frequent intervals will show trends in attitudes, which could be ascribed to specific initiatives, as well as the prevailing market forces.

Return on investment

Wouldn't it great to be able to show the return on investment that results from your training programme? Undertaking this type of study could be very time consuming, but the following approach might give you a 'rough and ready' answer:

Step 1 – Select some performance indicators you believe that your training programme should improve, such as: increased sales; reduced errors; reduced turnover; increased number of new accounts; higher productivity; etc.

Step 2 – After the training programme, periodically monitor the performance data for these indicators, such as: sales reports; employee error records; turnover data; records of new accounts; productivity reports; etc. Although a variety of factors could bring about an improvement in performance, a noticeable change in any specific indicator, following a training programme designed to target that indicator, could be evidence that the training has worked.

Step 3 – Calculate average revenue increases or cost savings for the performance indicators which may have been affected by the training intervention, such as: additional sales per employee multiplied by the average revenue per sale; average cost per error; average cost of a new employee [estimated recruitment, training, lost productivity costs etc]; average revenue per account; percentage increase in productivity multiplied by cost per employee; etc.

Step 4 – Gross up the figures. Multiply each average revenue increase or cost saving by the number of employees, accounts, employees retained, total errors avoided, or any other numerical value that shows the extent of the revenue increase or cost savings for the performance indicator throughout the company.

Step 5 – Calculate the net worth. Add the different revenue increases or cost savings for the whole company, then subtract the total costs of implementing the training programme.

Although this can be only a ‘rough and ready’ estimate, the resulting numbers will show the amount of additional revenue, or reduced costs etc, produced by the training programme. This process, while not exact, is an efficient and effective alternative to a time-consuming large-scale investigation. And it is better than not attempting to calculate the return on investment at all.

If you think this approach would work for you, please take a few minutes to record the key points in Template N.

Template N: **Now review and re-launch.**
Task N1: **Return on investment.**
Duration: **30 minutes.**

6. Time for decision

Having collected and evaluated all the data it’s time to meet the course sponsor and discuss:

- Is the product still acceptable?
- Is it delivering the required changes in business performance?
- Are there any other markets globally where it might be required?

If the answer is ‘yes’:

- Then consider re-launching the product to retain staff awareness.
- Or launch it in the new markets, using the evidence of success to encourage interest.
- Market the product more energetically using all internal communications media, focusing on benefits and sustained improvements to business performance.

If the answer is ‘no’ then how will you react?

- If the product is still valid but in need of updating or a ‘makeover’ – then make the necessary changes and re-launch.
- If the product is no longer valid, discuss with the sponsor what action to take.

Please take a few minutes to consider your action plan, and record the details in Template N.

Template N: **Now review and re-launch.**
Task N2: **Review and re-launch.**
Duration: **30 minutes.**

20

The power of one per cent

1. A winning formula
2. Evolutionary change
3. Progress or maintenance?
4. The end of the journey

1. A winning formula

In recent years the British track-cycling racing team has dominated World Championship and Olympic events, with the pinnacle of achievement being the 2008 Paralympics in Beijing, where the team won 12 out of the 13 Gold medals. This was a reversal from many decades when British racing cyclists rarely got on the podium.

How did they do it? The team coach said that their success was down to a strategy based on the 'accumulation of marginal gains'. Instead of trying to make a few big changes, it's more realistic to make lots of small changes in key areas. So the cycling team focused on the design of the bikes, training techniques, diet, the support of a sports psychologist... and many other aspects which remain secret.

This winning concept was expressed succinctly by an outspoken Yorkshire show-jumping champion, Harvey Smith. He explained his approach to riding like this: 'Every day I improve my performance by one per cent, which is easy to achieve. By consistently improving by one per cent every day… after three months I can change my performance beyond all recognition.’ The underlying approach is to improve your performance, day by day, in lots of small ways. You may remember the old adage: ‘Look after the pennies and the pounds look after themselves.’

2. Evolutionary change

The Quality gurus, like Crosby and Demming, identified two types of change a company can make. ‘Revolutionary change’ leads to significant increases in performance, but generally requires substantial capital investment and widespread upheaval. Which is why it often doesn’t work for long. The other type of change is ‘evolutionary change’, where systems and processes are changed in small increments. While the gains are not so dramatic, they are often longer lasting and cost significantly less. So much for the theory – how does it work in practice?

Let’s take one example – how you manage your time. Say you work from 9 am to 5 pm – that’s 8 hours, less 1½ hours for breaks and lunch, which leaves 6½ hours. Working one per cent more effectively on Day 2, you can do the same workload in 6 hours 26 minutes. Project a cumulative one per cent saving per day for 20 working days, and the 6½-hour working day has reduced to 5 hours 22 minutes. By working just one per cent more effectively each day you can free up over an hour each day in just one month. Now let’s look at some other examples of the power of one per cent:

- Learn about one new aspect of your company’s business every day. For example, discover exactly how another department in your customer–supplier chain operates, and how you could improve the quality of the information or services you share.
- When you next provide training or coaching, consciously change one element, to make it more efficient or effective.
- Chat with someone in your organization with whom you rarely converse. You’ll widen your knowledge of the organization, and build your networking relationships, so making it easier to get information or cooperation quickly.
- Learn about a new function on your computer every time you switch on. Take five minutes to look at the screen and explore at least one new tool or icon every day. You will discover short cuts and techniques that make your life easier and more efficient, and which will save you precious minutes when you need it most.

It's essential to constantly widen your understanding of how you, and your organization, contribute to the broader scene. Imagine you're an interior designer – you can't select a chair for a customer without knowing about the room it will be used in. You can't furnish a room without knowing how the rest of the house is furnished. You can't design a house without knowing about the owner's lifestyle.

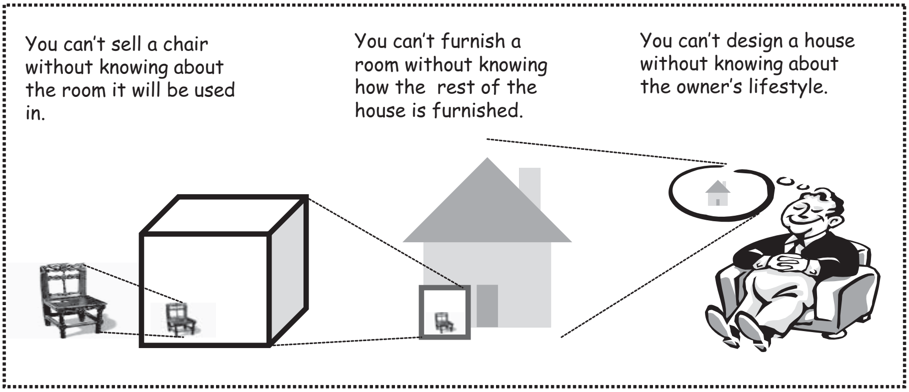


Figure 20.1 Chair–room–house

Please take a few minutes to consider how you might harness 'the power of one per cent' to improve the way you work, and record the ideas in Template N.

Template N:	**Now review and re-launch.**
Task N3:	**The power of one per cent**
Duration:	**20 minutes.**

3. Progress or maintenance?

This leads nicely into another concept. Every task or activity you perform can be classified into either 'maintenance' or 'progress'. 'Maintenance' tasks are the day-to-day jobs you do all the time to fulfil your job purpose. They're low risk and easily justified, so no one asks why you're doing them, but once you've done them you're no different from what you were before. Now 'progress' tasks are quite different.

They push back the boundaries and encourage you to develop new ideas or techniques. But because they involve risk and uncertainty they require justification.

If you allow yourself to be swamped by the everyday 'maintenance' tasks, weeks and months will go by and, at the end of it, you'll be in no different state from what you were in at the beginning. You may think that's OK, but the rest of the world will have moved on – your competitors may have developed new ways of delivering the services or product that you provide faster, cheaper, more competitive etc.

So you need to look at the balance of 'progress' and 'maintenance' in your life. It's not the nature of the task that determines which category it falls into but the end result. Processing a client's order or request is a 'maintenance' task, whereas finding a new way to process a client's order or request is a 'progress' task. See the difference? The good news is that many 'maintenance' tasks can easily be converted into 'progress' tasks once you know what to look for.

Please consider the following tasks and decide which category each one falls into – Maintenance [M] or Progress [P]:

1. Learning a new software system [M] or [P].
2. Team meeting [M] or [P].
3. Developing a new order system [M] or [P].
4. Sending out an invoice for a piece of work [M] or [P].
5. Attending a training course [M] or [P].
6. Developing new services or products [M] or [P].
7. Chasing another department for this month's results [M] or [P].

Let's explore your responses to this short questionnaire:

1. Learning a new software system. 'Progress' – as you should be more skilled once you are competent with the new software.
2. Team meeting. Normally 'maintenance', unless you're discussing new ground.
3. Developing a new order system. 'Progress' – unless your job is developing new order systems, when it would be 'maintenance'.
4. Sending out an invoice for a piece of work. Definitely 'maintenance'.
5. Attending a training course. Should be 'progress', as you will have new skills or capabilities having attended.
6. Developing new services or products. 'Progress' – unless your job involves developing new products, when it would be 'maintenance'.

7. Chasing another department for this month's results. Definitely 'maintenance'!

Now consider your working life. We all have to do 'maintenance' tasks but are you spending enough time on 'progress' tasks? Only you can decide – it's a very personal balance. How can you turn a 'maintenance' task into a 'progress' task and find ways to do things cheaper, more accurately, faster, involving fewer people or stages, etc? In today's uncertain financial climate, any improvement you can make could be life saving for your business.

If you always do what you've always done… you'll always get what you've always had!

Please take a few minutes to consider how you could rebalance your 'maintenance' to 'progress' tasks, and record the ideas in Template N.

Template N: **Now review and re-launch.**
Task N4: **Progress or maintenance?**
Duration: **20 minutes.**

4. The end of the journey

Well, now we've reached the end of our journey together. We hope that you have not only gained some new insights into the fascinating world of designing training, but that you have also designed a course or workshop along the way. The tasks we've included in the book were designed to transfer practical skills and approaches, and we trust we've been successful. Please let us know – is there anything we have missed which should have been in the book, or any topic which should have been developed differently?

Review and re-launch yourself!

Everything we do is an opportunity to discover more about the world around us, and learn how effectively we respond to the pressures and challenges we encounter. In the first chapter we mentioned a few ways in which buying the book might benefit you:

- Perhaps you've been delivering training courses that other people have designed, and you'd like to be able to do it yourself.

- You might have been told that you'll soon be asked to design a course and you haven't a clue where to start.
- You may be an experienced training course designer and perhaps feel the need to refresh your existing skills.
- Perhaps you've designed many courses but some of them may be a bit 'jaded' or need re-energizing.
- Or you may be taking on a new role as a training 'consultant' and want to be able to project a more professional image with your client departments.

At the most modest level we hope that the book has enabled you to meet the needs you started out with, but our expectations go higher than that. Having worked through these 20 chapters, has the book encouraged you to see yourself, and your future, with a fresh perspective?

- Will you take on wider training design roles?
- Do you see yourself moving to a different role?
- Can you see other avenues in the wider training or development profession?
- Or perhaps you feel motivated to make a more fundamental change.

So there it is. Best of luck with whatever route you take. The training and development profession is truly worthwhile – helping people to overcome their anxieties, or to develop confidence with unfamiliar subjects, is a great privilege and, as we all know, the role of the 'trainer' is not for the faint-hearted. If you can derive a fraction of the pleasure I have from both designing training and then writing this book about it, you will be a truly contented person.

Index