Developing Professional Training & Facilitation Skills

Companion Guide

eLearning Industry

LRNonline
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CHAPTERS

INTRODUCTION

You unintentionally share knowledge with people every day. Now, imagine if you could apply a set of skills that can make you an effective communicator and, more importantly, allow them to apply and even master this knowledge. This is what you can expect from this course.

Hi, I'm Ajay Pangarkar and I want to welcome you to Developing Professional Training and Facilitation Skills. I've been an award-winning author, employee performance strategist, and learning professional for more than 25 years and I'd like to help you to become a more effective trainer and facilitator.

Sharing knowledge with others is more than simply standing in front of people and saying what you have to say. Or worse, trying to share everything you know hoping something sticks. We've all been in these types of learning events and, like me, you probably left shaking your head wondering why you even showed up in the first place.

This is why you're here. I believe the skills you'll take away from this course will serve you well in your career and professional endeavors as well as in other areas of your life and interactions.

This course will walk you through the essential learning, instructional, and facilitation skills you need to ensure people learn from what you're sharing with them. You want them to leave saying confidently, 'Wow! That will make a difference in what I need to do' rather than, 'what was I supposed to take away from this?'

I'll share with you a set of techniques and behaviors that will make your training efforts deliver results. I'll focus on what you need to do and how to empower people when they leave your session.

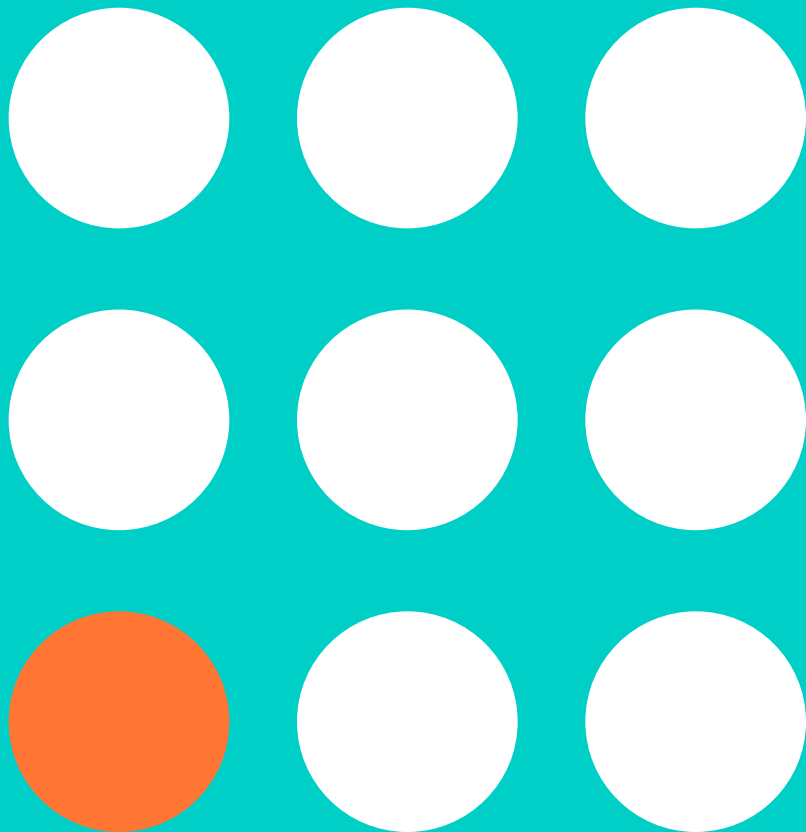We have a lot to cover, so let's get started.

Training Fundamentals

01: Elements of Effective Training

Think back to a time where you were a participant in a workshop or training course. I'm guessing you remember the courses where time just flew by and the trainer engaged you fully. I'm also pretty sure you were in some you thought would never end. And if you've been training or coaching for some time you tend to pay more attention to the trainers that do well and those that seem to be ineffective.

When I see a really good trainer, I ask myself, what makes them so effective? And guess what? These trainer s focus on five key habits.

First, they know what the basis is to making training effective. These are some basic things that many trainers often take for granted over time; things like recognizing their participants' learning expectations, aligning those expectations with the course objectives, and only focusing on the content that achieves the learning objectives.

The second point is that they are conscious about any barriers to learning and develop approaches to manage them. For example, experienced trainers know they'll most probably encounter a participant deep knowledge and more experience with the topic. So, these trainers will prepare to handle any resistance they may receive from them.

Third, prepared trainers always follow a training session plan. I know it sound like a lot of work but preparing a session plan well in advance provides you with direction to how the session should progress. It also allows you opportunity to plan for the resources you'll need and to manage your time properly.

The fourth point is simply about planning for training activities that get participants involved, and more importantly, practice the skills they'll need to use on the job. In the past I've conducted sessions to resolve conflicts. One of the most impactful activities I use is to roleplay a real-life situation. Planning this activity allows participants to practice handling conflicts and naturally, they feel safe doing so within the session.
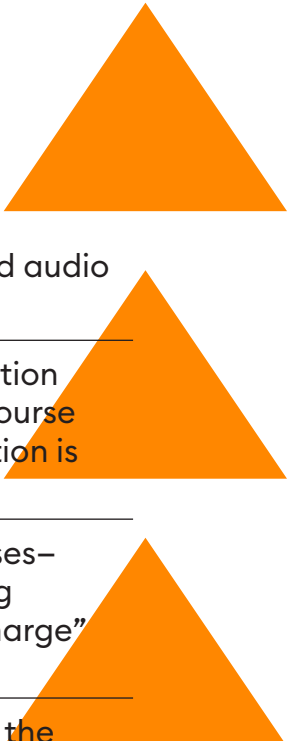
And the last point effective trainers apply is continually evaluate their training and performance. Simply they want to always ensure the session improves and participants leave with the desired skills when they complete the course. Keep in mind, your participants learning success is always in your control.

You have one objective...to have participants leave your session with a positive experience and confident in their newly formed abilities. Remember to keep in mind these five habits when preparing for your next course and I guarantee participants will say, 'wow! That was a wonderful experience!'

Exercise: The Calm & Competent Trainer:

Effective Trainers:

Know their subject matter.	They have researched their topic and are well informed; learners perceive them as credible.
Take the time to get to know their audience.	They demonstrate respect for, and listen to, the learners. They call learners by name, if possible.
Are nonjudgmental	They validate everyone's experiences and their right to their own perspective.
They respect differences of opinion and life choices.	They know that key learning can take place when people express different viewpoints and bring their own perspectives into the adult learning classroom.
Are culturally sensitive.	They are aware that their cultural background shapes their views and beliefs, just as the perspectives of learners are shaped by their own culture and life experiences.
Are self-aware.	They recognize their own biases and act in a professional manner when their "hot buttons" are pushed.
Are inclusive.	They encourage all learners to share their experiences and contribute to the group-learning process in their unique ways.
Are lively, enthusiastic and original.	They use humor, contrasts, metaphors and suspense. They keep their listeners interested and challenge their thinking.
Use a variety of vocal qualities	They vary their pitch, speaking rate, and volume. They avoid speaking in monotones.
Use "body language" effectively.	Their body posture, gestures, and facial expressions are natural and meaningful, reinforcing their subject matter.
Make their remarks clear and easy to remember.	They present one idea at a time and show relationships between ideas. They summarize when necessary.

Illustrate their points.	They use examples, charts, and visual and audio aids to illustrate subject matter.
Understand group dynamics and are comfortable managing groups.	They are comfortable with conflict resolution and know how to facilitate an inclusive course or workshop, where everyone's participation is encouraged.
Are flexible.	They read and interpret learners' responses–verbal and nonverbal–and adapt training plans to meet their needs. They are "in charge" without being overly controlling.
Are open to new ideas and perspectives.	They are aware that they do not know all the answers. They recognize that as well as offering their audience new knowledge or perspectives; they can also learn from course participants.
Are compassionate.	They understand that the topics addressed during training may have an emotional impact on learners. They are empathetic and understanding about learners' emotional reactions.
Are receptive to feedback.	They encourage co-trainers and learners to give them feedback, both informally and through formal evaluation. When they receive negative feedback about their performance, they critically analyze this feedback instead of becoming defensive.
Continuously work to improve their teaching and training.	Even the most experienced trainers can improve their training skills. Effective trainers seek out opportunities to learn new skills and use negative feedback as an opportunity to improve.

01: QUICK QUIZ

1. Which one of the following would not be considered a requirement to make training effective?

Recognizing their participants' learning expectations

Aligning participant learning expectations with course objectives

Focusing on course content that achieves learning objectives

Ensuring participants receive the content in a comfortable environment

2. As an effective trainer, what should you be consciously aware of when conducting as training session?

Barriers to learning and how to effectively manage them

Specific learning requirements for participants not in attendance

Costs involved to conducting the training session

Participant's specific nutritional and lifestyle needs and expectations

3. What is the one thing that will provide an effective trainer with guidance and direction?

Preparing a training session plan in advance

Obtaining a stakeholder expectation check list

Making sure to select the right location for the training

Avoiding concerns over resource and time allocations

4. What is that effective trainers will always do to ensure they are performance well?

Continually evaluate their training and performance skills

Ensure other trainers can step into conduct the training session

Focus on obtaining high results on participant evaluation forms

Satisfy stakeholders ensuring the felt they received their money's worth

02: Types of Training Occurrences

You know those movies scenes where students are in a classroom and only the teacher is speaking? You may have experienced this back in school. All I know is that it was one-way interaction no one in the class had any.

Our schooling conditioned us to associate learning as one-way event where the expert shared their knowledge with little opportunity to participate. As we become adults, we subconsciously emulate this ineffective behaviour training people the same way.

Well, there's good news. Training no longer has to be this way. Because of innovative technology and evolving learning methodologies, effective trainers can leverage and quickly adapt to participant needs by creating more inclusive and interactive learning environments.

Let's go over some of the five more common training methods that deliver more interactive and inclusive learning.

We all recognize the first one which is instructor-led, or also known as classroom-based, instruction. Simply, the instructor and participants are physically present at the same location...it's a face-to-face event. But, unlike when you were in school, trainers are expected to create a two-way engagement ensuring participants can fully invest and take some responsibility for their learning process.

Closely associated with instructor-led session are other in-person interactive learning activities such as coaching and mentoring. Here the coach helps one or a small group of participants to improve specific performance areas.

The coach usually plays a facilitation role rather than an instructor. All they're expected to do is to guide participants to do something specific, rather than showing and doing it themselves. Put simply, coaching is a highly practical process focusing on immediate needs. It's something you should always incorporate when conducting in-person training.

Another increasing familiar training interaction is elearning, also known as online learning, or web-based training. Elearning is training that's usually delivered through some technology medium, just like you're doing right now. Elearning's biggest advantage is that participants and the instructor can be anywhere. Most only recognize online courses as elearning but it can also be live events like webinars and online coaching. You're doing it right now watching this course!

Another growing trend is something called blended learning. Blended learning is exactly like it sounds, it's where participants acquire knowledge and skills through a variety of learning methods. Some of the content may be delivered through an instructor-led session while other parts are through some other form of learning media.

Most associate blended learning as part instructor-led and elearning but it can also be old school like using books and doing problems on paper. The idea is not to simply have different methods but rather have participants receive knowledge using the most effective learning approach while allowing them control over time, place, path, or even their pace.

And finally, you may have noticed that people's attention spans are getting shorter. So as a trainer, you must be able to disseminate knowledge in small chunks. Many refer to this as microlearning and it's a method of delivering content in small, targeted, and with specific intention. Technology has made this possible and easy to do. When done well, it allows learners to control what, where, and when they learn.

So, as you can see, this is a really exciting time to be a trainer. These are just some of the more common learning approaches you'll come across, but you're only limited by your creativity and imagination. Always keep in mind that your role is to help others learn in ways that helps them to improve their performance.

TIPS: The Calm and Competent Trainer

How to Facilitate Effectively

Create an Effective Learning Atmosphere

There are three important things that you, as the Facilitator, can do to help create an effective learning atmosphere for your course participants.

1. Support the group of participants by building an atmosphere of trust and modelling a positive attitude.

One of the most important tasks of a good facilitator is to build an atmosphere of trust. An accepting and non-threatening atmosphere encourages the expression of ideas, questions, beliefs, and attitudes by all participants. Below are some ways to build trust among your group.

- **Assure that confidentiality will be maintained.** Establish a group rule on the first day that everyone's confidentiality must and will be protected so that people can talk freely without fear that their comments will be shared outside the course.

- **Provide constructive and supportive feedback.** Let participants know when they've contributed something useful and interesting to the group. For example, you might say, "That's a very good example of the concept we are discussing."

- **Model a positive attitude.** Participants will probably get tired as the course progresses and need some encouragement. Call upon the person appointed as the energiser and maintain your own positive attitude. Address any difficult moments during the course with honesty and constructive comments. For example, "This topic brings up difficult feelings for many; by exploring our own feelings, we can better help our clients to do the same."

2. Ensure that the entire course content is covered.

It is important to stay on schedule and help participants see how each session follows logically from the one before.

- If participants deviate from the topic, offer to address their comments during a break.
- Write additional topics identified by participants on flip chart paper as a reminder of topics to cover if there is time remaining at the end of the session. Keep this list visible to participants throughout the workshop.
- Each session's lesson plan includes key summary points. Referring to these key points, and reviewing them at the end of a session, will help you know if you have covered all of the main content of your lesson plan.

3. Model effective facilitation skills.

Try to remember these basic facilitation strategies throughout the course:

- Ask open-ended questions. For example, you might say, "What did you learn from the counselling role play?" instead of "Did you learn how to counsel a client during the role play?"
- Listen carefully to the communication and for any feelings that may accompany it.
- Rephrase participants' communications accurately for clarity, when necessary, and without judgment.
- Respect every participant's feelings, perspectives, and contributions.

  Adhere to the time schedule.
- Focus on developing skills, not just knowledge.
- Make the learning process active.
- Make the course material clear by speaking slowly and using language that is understood by all participants.

Prepare Clear, Well-Structured Handouts

When preparing your own handouts (e.g., additional group exercise worksheets, articles, handouts from PowerPoint slides or acetates), follow the guidelines below:

1. Create handouts with a clear learning goal.

Be selective in the handouts you choose for distribution to participants. The handouts should be central to participants' learning and contribute significantly to their understanding of the session's content.

2. Organize the handout in an easy-to-read format.

Don't put too much text on a page. Use appropriate spacing and a clear font style (e.g., Times New Roman - 12, Arial - 11, Comic Sans - 11 for group worksheets, etc.).

3. Only photocopy originals.

It's common for handouts to be copies of copies. This can be problematic when copying articles or book chapters. Each generation of copies can look worse than the last. Use the original source when making copies.

02: QUICK QUIZ

1. A learning approach incorporating various instructional methods is referred to as:

Elearning, online learning and web-based training

Instructor-led training, coaching, and mentoring

Blended learning using instructor-led, elearning, and other tools

Micro-learning, elearning through web-based technology

2. The learning approach that best deliver learning in small chunks is called:

Micro-learning

Web-based training

Online learning

Individual coaching

3. Elearning is the learning approach that

Permits both participants and instructor to learn anywhere

Blends instructor-led training with micro-learning

Delivers instructor-led content through the web

Consists primarily of webinars and online coaching

03: Core Competencies of Effective Trainers

Take a moment and think back to a workshop or course you really enjoyed. You probably remember the trainer and how positive they made your learning experience. I remember a couple of teachers who created learning environments where I excelled.

I'm so impressed when I come across a skilled trainer in action. I always want to replicate what they do so well. They just seem so comfortable conducting the session and getting everyone engaged in their learning.

Naturally, these trainers aren't born with this talent, well, maybe some are. But for most, it's a set of five core competencies that effective trainers practice and hone over time.

First, these trainers assess participant performance needs well before the session begins. They'll identify key performance issues the training session is expected to address. They then set performance benchmarks and measures so they can properly evaluate participant skill development.

The next core competency is a something trainers' debate and that is their involvement in the training design. Trainers are not usually directly involved with course design...this is the role of an instructional designer, but impactful trainers will review the course design and adapt it to meet their participants' leaning needs. It also helps them to connect with the performance needs mentioned in the previous point.

The third competency is about how they facilitate training. The issue here is that most people will lead a course using the content and material they receive without further thought and usually designed by others. But effective trainers will become very familiar and sometimes intimate with the content, so they better understand what participants expect from the course and expected results.

The fourth competency is to support the transfer of learning. Participants come to your session not to only learn; they come to become better in their job. This means you should include activities and materials that will help participants actually apply and practice what they learn. Consider activities like simulations and roleplays for participants to experience the learning.

And finally, these trainers will continually evaluate their learning effectiveness. Unfortunately, most trainers leave training evaluation to the end of the session, almost like an after-thought. Effective trainers consider it an ongoing process that's always a common thread throughout their training effort.

The most common evaluation is what trainers call a smile sheet given upon course completion, but evaluations can take many forms including knowledge tests, skill demonstrations, and comparing pre- and post-training performance.

I know that effective trainers always look at ease but clearly this effortless ability is about preparation and a focus. So, the next time you're asked to deliver a course consider incorporating these five core trainer competencies and BE THAT trainer someone that helps someone thrive.
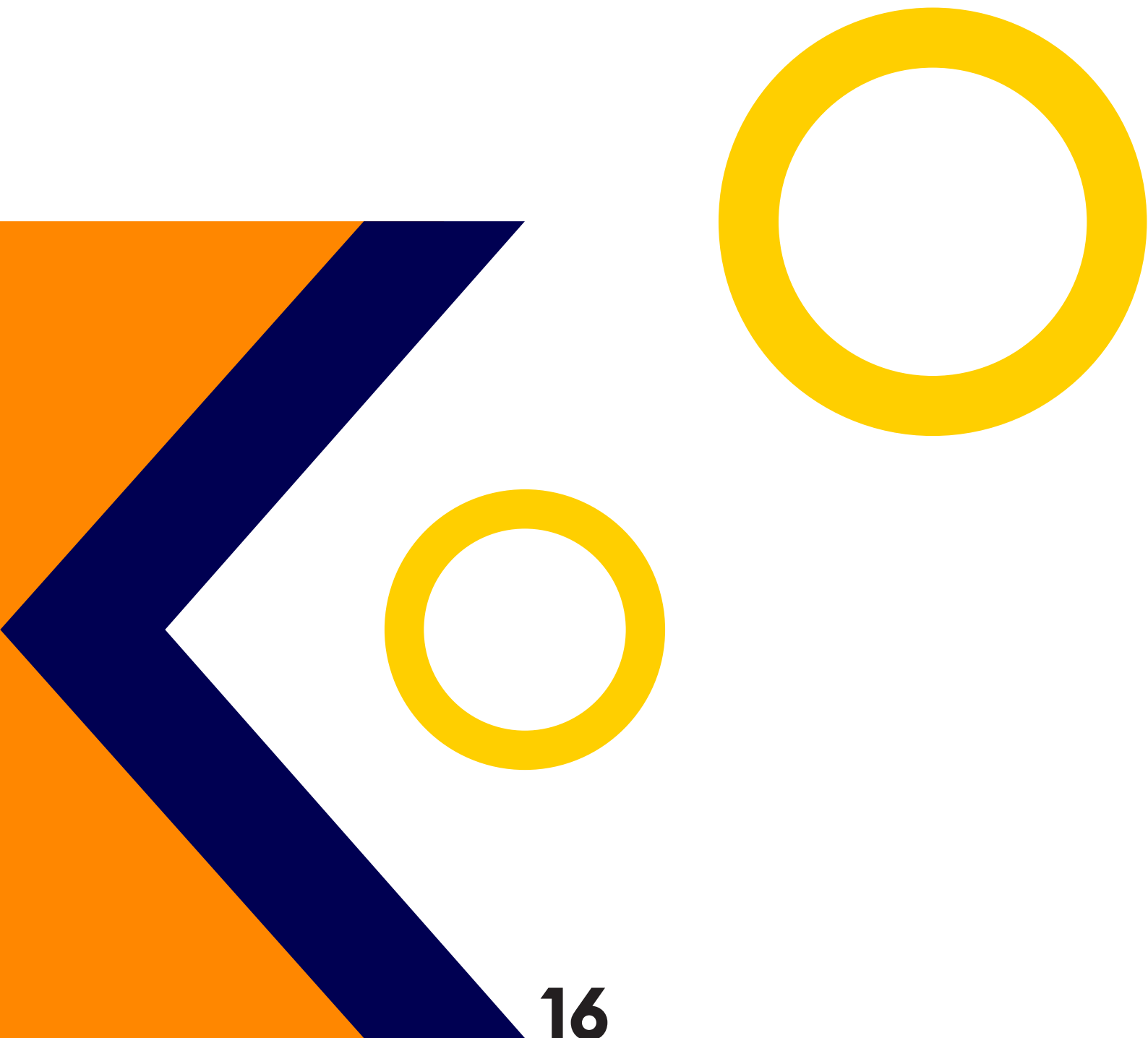
Exercise: Presentation Skills Checklist

Speaker: _____   **Evaluator:** _____

Put an X everywhere you agree with the statement.

Delivery	**Content**
The speaker greeted the audience warmly.	The opening got my attention.
I could hear the speaker.	The introduction told me what to expect from the presentation.
I could understand the speaker.	The purpose of the talk was clear.
The talk was delivered with warmth and feeling.	The talk was designed in a logical way from beginning to middle and end.
The talk was delivered with personal conviction from both the speaker's mind and heart.	The presentation was well-suited to the audience.
The presentation seemed practiced.	The content was interesting to me.
The presenter involved the audience.	The speaker summarized the main points before finishing.
The speaker handled questions and comments with calm courtesy.	The speaker let us know when the talk was over.
The talk contained effective examples and illustrations.	The talk ended on a strong final line or idea.
The presenter defined technical terms and statistics for us.	The presenter ended on time.

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| Body Language	Visual Aids
The speaker stood during the presentation.	The speaker used visual aids.
The speaker had good eye contact with the audience.	I could read the material from where I was sitting.
The speaker showed no distracting movements or gestures.	The visual aids got the point across in a clear and simple way.
The speaker smiled.	The speaker did not block the screen or flipchart.
The speaker used his/her hands to help communicate ideas visually.	The speaker talked to the audience rather than to the screen or flipchart.
The speaker tried to use verbal focusing techniques.	The visual aids used key words rather than sentences.
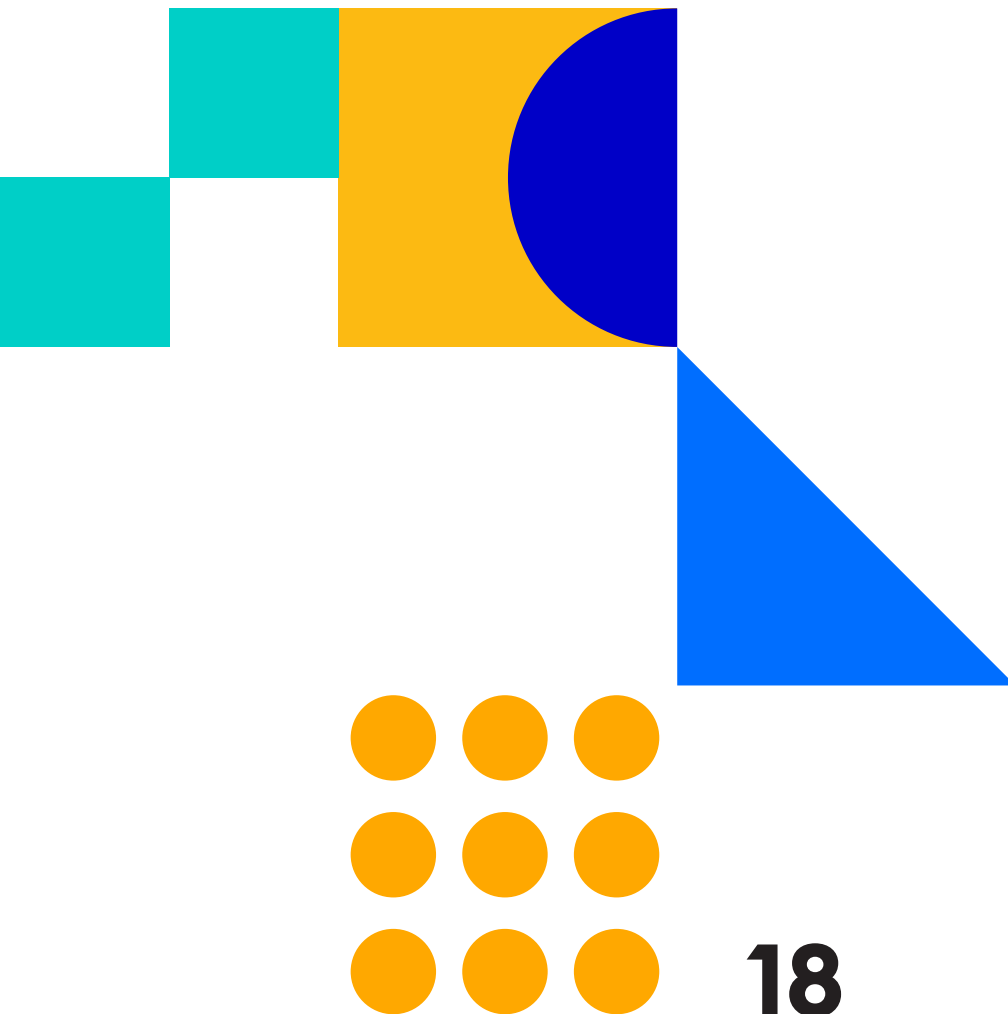
03: QUICK QUIZ

1. Before conducting a training session, highly effective trainers will

Assess participant performance needs

Secure a training location and order refreshments

Obtain approvals from senior stakeholders

Establish a budget and source financing for the course

2. Effective trainers are not usually involved in which training activity?

Training course design and development

Skills and session evaluations

How to actually deliver the course live

Course scheduling and obtaining resources

3. Effective trainers are skilled in the:

Transfer of learning on to the participants through application

Theory of the content they are delivering

Development of tests to give to participants

Documentation of the session activities and participant engagement

4. Skilled trainers will always incorporate:

Training and learning evaluations throughout the session

Training and learning evaluations at the end of the session

Training and learning evaluations at the start of the session

Training and learning evaluations at the halfway mark of the session

04: Framing Effective Learning Environments

Are you really good at something? Do you remember when you learned this skill? Why was this a positive learning experience? I ask these questions for you to reflect on how certain factors helped you to master the skill. But even though you had a positive experience, it's highly possible another person may not have had the same success as you.

Keep in mind that learning is a subjective and personal activity and there isn't one best way to learn. So, it's important to foster a variety of environments that will increase opportunities to learn. This is the fun part for trainers as it's often the most creative aspect to crafting your learning session.

Effective trainers recognize they're no longer forced to use specific tools or be in a certain context like a classroom. They move past these elements creating learning environments applying these five elements.

The first is knowing why and what motivates participants. Don't generalize learners in the session and don't generalize if you're conducting multiple sessions. Learn as much as you can why they're coming to your session and what motivates them. If you can, speak with them before and speak to those sending them to you, like their boss. The more you know, the better you'll address their specific learning needs.

Second, clearly define the learning goals. It's not about trying to cover all of the content, which a lot of trainers try to do. What you should do is adapt and align the content to the needs of the participants. Don't be one of those trainers that throws everything at participants and hopes something sticks. Training is about deliberately identifying content that addresses their performance issues.

Next, is to prepare appropriate activities to support targeted learning. Getting to know your participants allows you to develop skills at the appropriate level. You'll have some sessions with beginner participants and other sessions where they're more advanced. Involve appropriate activities to meet the participant's knowledge level so they dome get frustrated or bored. This will allow you to provide relevant feedback for improvement.

Also, be sure to assess whether participants are retaining the knowledge. Many will provide some type of test. But I'd rather be more creative. There are many ways to evaluate them like getting them to work through a simulation or practical activity. Just make sure you apply assessment strategies that best reinforce appropriate learning.

And finally, foster a learning culture. Build your participants confidence by showing empathy, creating an environment allowing them to take risks and allow them to experiment and be creative.

Even though participants must do the learning, your role is to establish an environment that allows them to learn. We really one major responsibility, and that's to create the conditions for participants to succeed.

Exercise: Framing Effective Learning Environments

1. Characteristics of learners _____

Participant Name: _____

Job Role: _____

Job Objectives: _____

_____

_____

Hobbies & Interests: _____

_____

_____

What is/are your 1 to 3 session takeaways

1. _____

2. _____

3. _____

Other Hobbies & Interests:

_____

_____

_____

2. Framing effective learning environments

Session Learning Goal (In one paragraph state the goal of the Training Session)

_____

_____

State the learning objectives:

1. _____

2. _____

3. _____

4. _____

5. _____

Learning Activities to Support Learning

1. _____

2. _____

3. _____

4. _____

5. _____

Assessment Tools and Activities

1. _____

2. _____

3. _____

4. _____

5. _____

04: QUICK QUIZ

1. One of the things effective trainers never do is to:

Generalize their audience

Avoid budgeting appropriately

Seek approval for the training

Plan out the training in detail

2. Successful training sessions occur when you:

Adapt the content to the needs of the participants

Successfully covered all of the content

Share topics with participants hoping they retain some of it
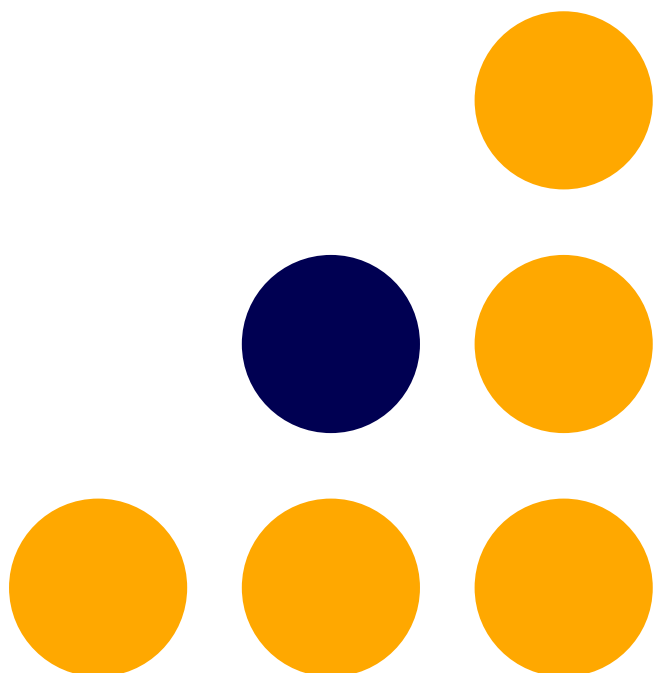
Ensure learning is taking place and not worry about performance

3. It is essential to prepare appropriate activities to support targeted learning or participants will:

Get frustrated or bored

Believe the course is easy

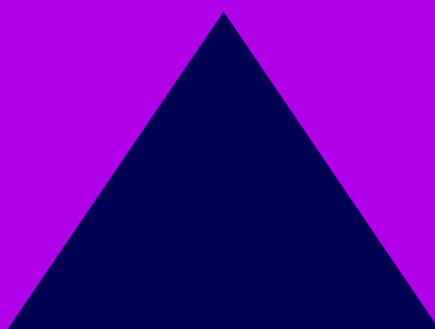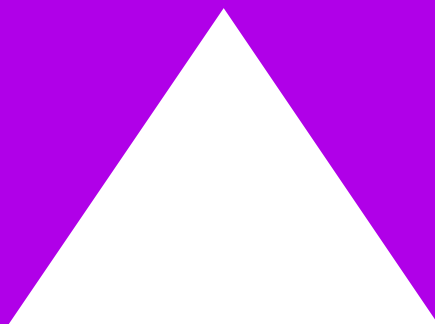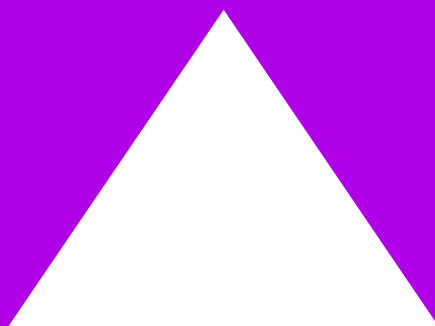Not show up to the session

Not be compliant to your message

02

Overcoming Barriers to Learning

01: Revisiting Adult Learning Principles

Learning is one of those abilities all humans do naturally. No one really asks themselves whether they're learning right now? We just do. But we also learn for specific reasons and it's why you need to be aware why and how people learn.

But you must be willing to learn if participants are going to experience any kind of growth or personal development. Besides, learning new things keeps our brains active and healthy and helps preserve our mental functions. That said, the process of learning isn't always easy. Sometimes it's difficult and uncomfortable.

Every day, employees are sent to learn new skills. As trainers, we must keep in mind that participants come with a wide range of experiences, knowledge, interests, and abilities and appreciate when its recognized. Effective trainers apply five primary learning principles to get their participants to learn.

First, adult learners are usually self-directed. Most want to be involved in their learning. Rarely do they want someone else to control what they learn so allow them to be part of the process. Get them take responsibility for their choices and allow them to make their own decisions within the context of the course.
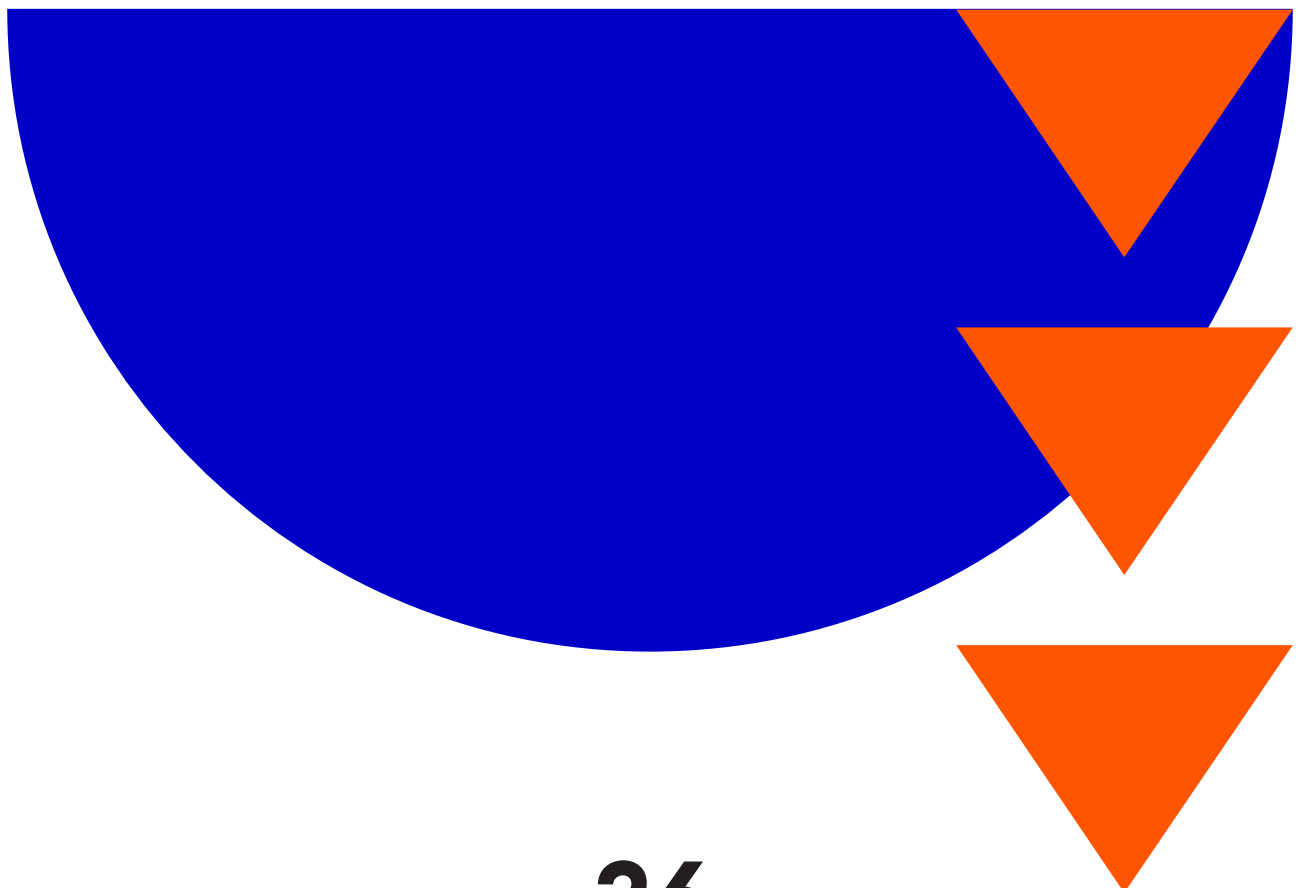
1. Active Learning

Adult learners want to be:

- Self-directed.
- Responsible for their choices.
- Make decisions independently.
- Allowed to contribute.
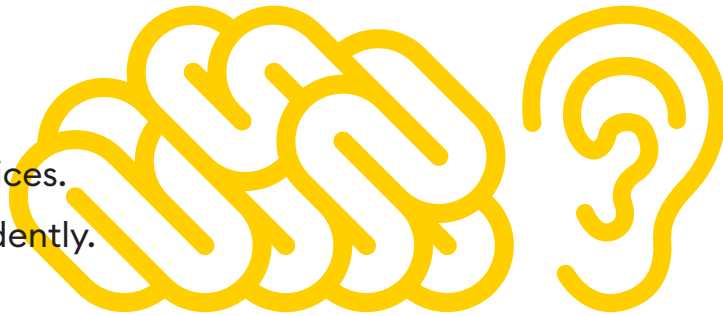
Second, leverage your participants existing knowledge and experiences. This is how you can make the session meaningful for them. They will appreciate when you organize your content with defined outcomes. This will help to make lasting connections with the content. Draw out their past experiences, current knowledge, and opinions using open ended question like, has anyone applied this skill before?

2. Leverage Learning

Second,participants need to:

- Leverage existing knowledge and life experiences.
- Connect past experiences with current knowledge and opinions.

Next, recognize that everyone is typically goal oriented, whether they admit it or not. It's essential to clearly identify intended and expected outcomes in relation to their specific concerns. As a trainer, you can maximize the participants' learning experience by aligning their motivations with the activities.

3. Goal Learning

Next, recognize that participants are:

- Typically goal oriented.
- Interested in outcomes in relation to specific concerns.
- Expecting learning experience align with motivation.

Participants also want the training to be relevant and practical. People need to clearly see a reason to learn and that's usually when its applicable to their work or something they value. This is why you must identify precise objectives before you begin instructing. Adult learners will focus on practicality and take in concepts that will demonstrate tangible improvement.

4. Practical Learning

Participants also expect training that:

- Highlights practically.
- Don't just wantto learn theoretical concepts.
- Expect appropriate ways and convert theory into practical activities.
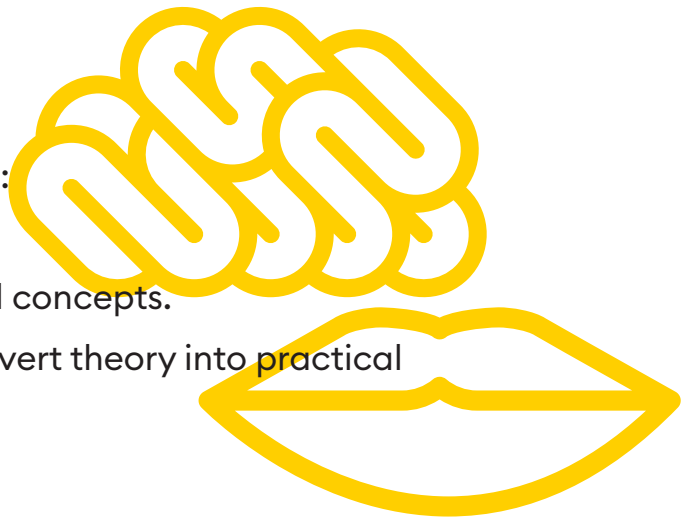
Instructors must acknowledge the wealth of experiences their participants bring to the session. Respect why they are in the session. Training success will come when you embrace learning collaboration and inclusion. Treat each participant as equals and with the respect they deserve, and you'll see an increase in learning acceptance and growth.

5. Collaborative Learning

Collaborative learning is about:

- Training not being a one-way event.
- Being a fully collaborative process.
- Respecting why participants show up.
- Leveraging motivations.

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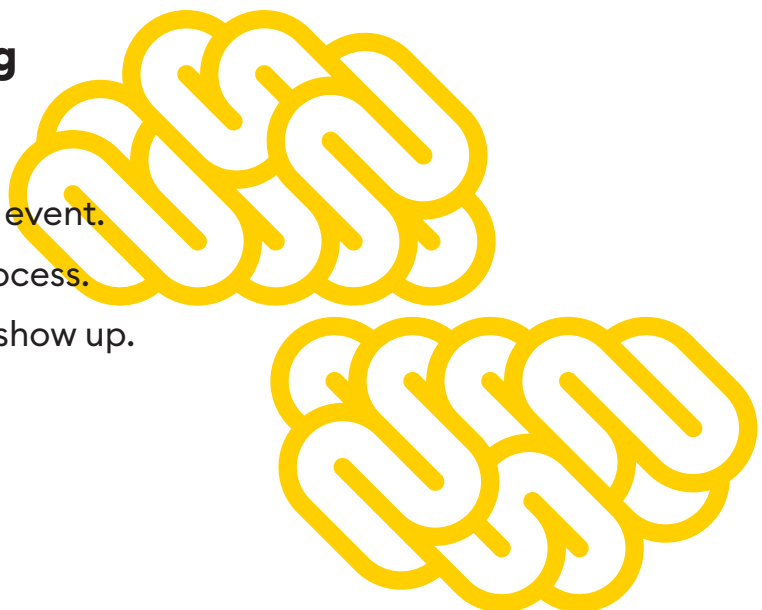
Exercise: Principles of Adult Learning

1. Adults are often concerned that participating in a group will make them look weak, either professionally or personally.

- Design training workshops, educational exercises, and discussion sessions that help people feel **safe** enough to ask questions and **confident** that they will be respected.

- Don't ask people to take **risks** too early in a workshop or course (for example, engaging in a role play exercise) unless they already know each other well.

- Provide opportunities and allow time for people to establish themselves in the group.

2. Adults bring a great deal of experience and knowledge to any learning situation.

- Show **respect** for participants' experience by asking them to share ideas, opinions, and knowledge. Verbally **recognize** that they may be a good resource for reaching your teaching goals.

- A needs assessment can tell you more about the individuals in the group. Or, if you already know the participants, you may realize that particular individuals can provide helpful input before, during, or after your session(s). See number 5.

3. Adults are decision-makers and self-directed learners.

- Do not seek to make people obey you. Adults will do what they need to do.

- Be the **"guide on the side"** rather than the "sage on the stage".

- Listen to what they want and need and **be flexible** in your planning. **Seek feedback** from the group. Change your approach if your agenda or methods are not working.
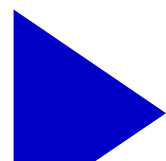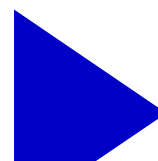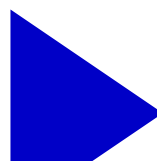
4. Adults are motivated by information or tasks that they find meaningful.

- Conduct some type of **needs assessment** so that you are aware of what people want (and need) to learn, how much they already know, and the kinds of "generative themes" that might affect their attention span.
  - Generative themes are concerns and issues that are most important in a person's life.
  - Generative themes may enhance or challenge a person's ability to learn.
  - They could include such things as the fear of losing a job, the health of a loved one, the desire for a promotion, the need for a change, the pending birth of a child, problems in a relationship, or new possibilities for growth and development.

5. Adults have many responsibilities and can be impatient when their time is wasted.

- Be **thoughtful** and **kind**.
- Begin and end your session on time.
- Understand who is in the audience and why they are participating.
- Learn what questions they have about the subject.
- Don't cover material they already know unless there is a good reason for it.
- Recognize that your subject is only one of many those participants may be interested in learning more about.

Inspired by writings from The Adult Learner: The Definitive Classic in Adult Education and Human Resource Development by Malcolm S. Knowles, Elwood E. Holton III, & Richard A. Swanson, 2005, Burlington, MA: Elsevier.

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02: Effective Learning Approaches

Do you remember going to a course where you felt frustrated, confused, and annoyed? Maybe you were trying to learn a topic but unable to. And at other times the topic was easy to understand and learn. Most people think its something with how they learn. The reality is it's probably not you, it's more about the learning approach used by the instructor.

Research has shown that when it comes to learning not everyone approaches learning in the same way. Trainers need to adapt and include a variety of different learning approaches when planning their training sessions. Since each training program is unique, each trainer must apply their judgement on the approach that fits best when developing their training session.

Most learning approaches fall into one or more of these approaches.

The first is the behaviorist approach. This approach centers around the belief that appropriate behavior can be taught through repetition combined with feedback from the facilitator. Positive feedback encourages and reinforces success while negative feedback discourages the repetition of a mistake or undesirable behavior.

1. Behaviorist approach

Behaviorist approach involves:
- Modeling - showing the steps required to do something
- Practice - getting the person to replicate the steps shown
- Feedback - providing positive and improvement recommendations
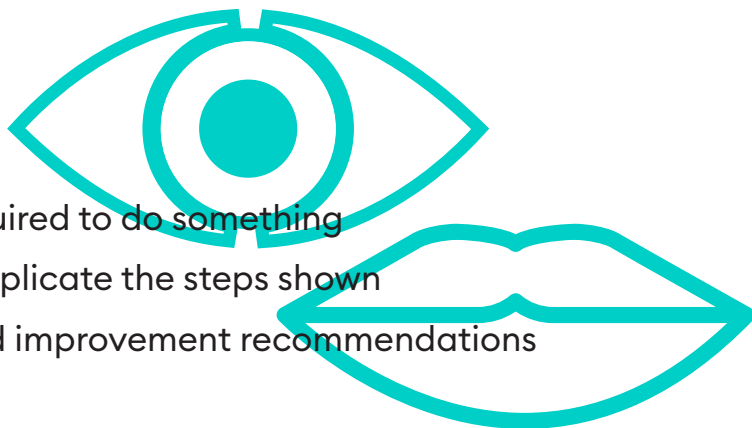
A little-known fact, my first job was at Burger King. I didn't know it at the time, but they applied the behaviorist approach to my training. They modeled how to build a burger, even down to how many drops of ketchup. Then they had me repeatedly practice making the burger. Each time I received feedback on what I did well and what I can improve.

Next, is the cognitive learning approach. Remember when you were in schools, and you just sat their listening to the teacher? They were most probably applying a cognitive approach. Naturally, they are the subject expert and authority. Like your school experience, participants aren't actively engaged apart from listening to what's being said.

Within the cognitive approach the lecturer will engage participants through targeted questioning but it's more one-way, directive interaction. Some claim this approach is out of date but there are occasions when you'll want to use it like when dealing with dangerous goods or ensuring people are compliant with specific rules.

2. Cognitive learning approach

Cognitive learning approach is when:

- Trainer is primary authority and provider of information.
- Participants aren't actively engaged because trainer is the one delivering the content.
- Necessary and appropriate e.g. compliance issues or handling hazardous materials.
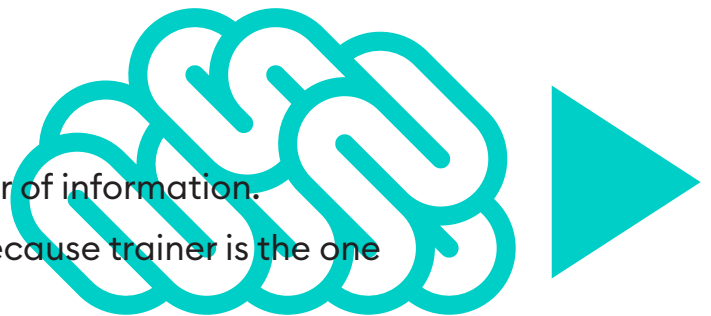
Lastly, is the Humanistic approach to learning. This approach relies on the participants to be actively involved and push them to achieve higher learning experiences. The trainer remains the subject expert, but participants are responsible for their learning. The trainer will help steer them in the right direction by guiding them, essentially, they're as a facilitator and a coach.

I often apply the Humanistic approach when leading sessions requiring practical or higher-level judgement like when I instruct strategic problem solving. First, I present a framework to address the issues. Then, I present participants with a business problem to solve. At this point it's up to the participants to interpret and apply the framework. There will be different responses, but that's okay, there are no right or wrong answers, it's about the process.

3. Humanistic learning approach

Humanistic approach to learning:
- Relies on the participants active involvement.
- Trainer subject expert but allows participants to interpret and apply material.
- Trainer eventually transitions to facilitator and coach.
- Practical and engaging learning process.
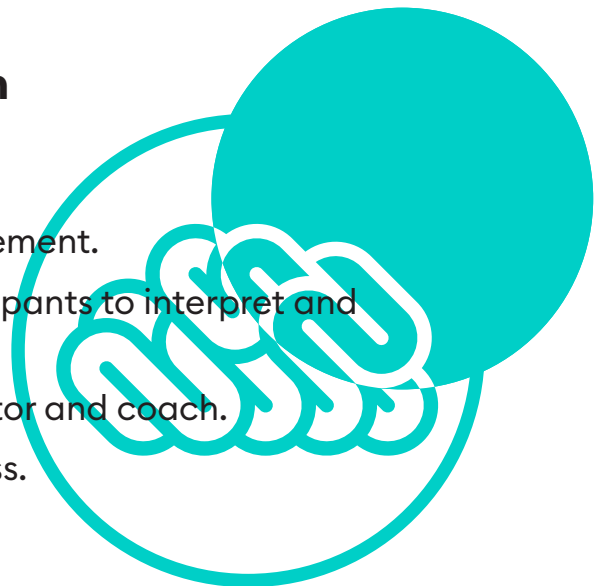
There isn't one approach that fits every learning scenario or topic. It requires your judgement and knowing that you may need to apply a variety of approaches to create an effective learning environment. Just be aware how and when you apply these approaches and know when to engage your participants in their learning journey. It's not about their intelligence. It's about how well you foster a conducive learning environment.

TIPS: Improving Lectures: "Creatively"[1]

1. Be Clear with Yourself About Why You Choose to Lecture–don't just lecture out of habit; be clear on why you are choosing to lecture. Common reasons for lecturing are to:

- **Establish the broad outlines of a body of material**–such as presenting a group of conflicting opinions or different schools of thought related to a particular topic.

- **Set guidelines for independent study**–highlight key questions and encourage curiosity for follow-up study.

- **Model attitudes you hope to encourage in students**–encourage students' critical thinking and open discussion by supporting their arguments with evidence (where possible) and explore alternative perspectives and interpretations.

- **Encourage learners' interest in a topic**–use personal animation or show passion for the topic of discussion.

- **Set the moral culture for discussions**–be focused, rigorous and respectful, especially in early lectures; explore opinions that oppose your own; wrap up with concise, final conclusions.

2. Research Your Audience–Before the actual day(s) of training, find out something about the culture and concerns of your audience.

If you are unable to find out about your audience before a lecture, spend some time at the beginning asking questions and allowing each individual to express opinions (ask for show of hands for large groups). This can include suggestions of possible themes (from you or the group), a discussion of common professional roles, or a discussion of their perceptions of the day's learning objectives.

[1] *from The Skillful Teacher. Brookfield, SD. (1990). San Francisco: Jossey-Bass.*

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3. Pace Your Presentation: "The average attention span for listening to an uninterrupted lecture has been estimated at somewhere between 12 and 20 minutes."

If a session is scheduled for a longer period of time, break up the lecture into 15 to 20-minute sections; either offer breaks in between or incorporate discussions, question-and-answer sessions, or group exercises (large or small groups).

4. Personalize Your Presentation—Try to personalize the topic by using personal examples from your life, anecdotes from current events or pop culture, or by connecting concepts by using analogies and metaphors that are familiar to people.

Personalizing lectures serves 3 functions:

- It helps to provide familiar, accessible points of entry for complex ideas.
- It captures the attention of an audience to see someone speaking from personal experience.
- Talking publicly about aspects of your life outside of your role as a trainer or clinician helps to create credibility and helps connect with your audience.

5. Speak from Notes—versus speaking from, and strictly adhering to, pre-written scripts. **Skeleton notes** are carefully drawn up and give you an ordered, systematic progression of ideas and allow you freedom to digress.

Give yourself permission to incorporate audience questions and discussion without feeling overwhelmed because you strayed from the script. Know that you have thorough knowledge of the topic so that a word or phrase from your notes will trigger ideas and associations.
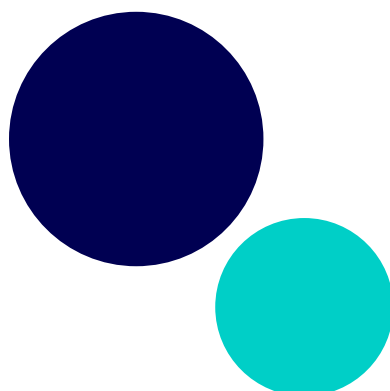
6. Use Visual Aids–Use graphic depictions of main points to demonstrate the connection between them in an appealing way. This will be especially helpful to those who are primarily visual learners.

Consider distributing copies of visual aids **at the end** of a lecture–be sure to tell your audience this at the beginning of the presentation so they don't spend time trying to copy your words. However, some participants will prefer that you provide them with copies, for example, of PowerPoint slides so they can make their own notes as you speak.

7. Use Critical Incidents–Critical incidents, or case studies, are brief, written (or spoken) depictions of typical clinical events that participants are likely to see in their practice.

This kind of training method requires that audience members be able to relate to the incident described and use what they are learning to analyze the situation. Avoid this technique if the audience has little or no knowledge or experience with the topic. If the participants do have prior experience with, for example, HIV patients, ask them to share their own cases with the group.

8. End the Session with a Question–Conclude your training with questions about the topic you've just discussed.

Don't be afraid to play the devil's advocate (i.e., give the other side of a perspective or opinion) on some of your own points. This will encourage your audience to explore the topic further and ask questions.

9. See Yourself as Your Audience Sees You–Find ways to observe, and improve upon, your own lecturing.

This can be done by audience evaluation, informal discussion with audience members, or by videotaping yourself and reviewing the tape for behaviors that may be distracting for the audience. You can also audiotape yourself and make improvements in your verbal pacing, pitch, and delivery. Another option is to have a friend or colleague observe you and provide you with constructive feedback.

TIPS: Essential Learning Approaches

The following approaches for adult learning should guide the processes you use when training professionals. The following key factors will help you conduct successful training programs:

1. Because learning is enhanced by challenge and inhibited by threat, establish an environment where participants feel safe and supported; where individual needs and uniqueness are honored; where abilities and life achievements are acknowledged and respected.

2. Treat participants as peers, accepted and respected as intelligent experienced adults whose opinions are listened to, honored, and appreciated.

3. Deliver content that has relevance, so participants can relate what they learn to past experience. The brain automatically searches for meaning, patterns, and relationships based on prior knowledge and experience. Learners cannot separate the learning of a skill from the meaning that skill has for them.

4. Learners will perceive the content within their own global view. Therefore, elaborate on your intended context, including history, purpose, methods, and intended results.

5. Deliver content that has immediacy; people learn best what they can apply right away.

6. Facilitate self-directed learning, where participants make action plans and take responsibility for their own on-going, professional development.

7. Provide opportunities for participants to give feedback and input to the learning process, and to give and receive feedback and input from trainers and other participants.

8. Guide learning processes that foster teamwork and provide opportunities for team members to:

- Develop team norms and guidelines for working together
- Share perspectives, knowledge, insight, and experience
- Tell personal stories, creating common ground and connection
- Develop materials and carry out tasks
- Make action plans and decisions
- Have fun together

9. Learning involves both focused attention and peripheral perception. Trainers should pay attention to all facets of the educational environment.

In addition to traditional concerns with noise, temperature and so on, peripherals include visuals such as charts, illustrations, displays, tables, chairs, windows, art, etc.

The use of music is important as a way to enhance and influence more natural acquisition of information.

The subtle signals that emanate from the trainer have a significant impact. Our inner state shows in skin color, muscular tension, posture, rate of breathing, and eye movements.

10. Provide learning processes that require active involvement. Have participants try out new ideas and where activities and experiences support facts and theory. Provide opportunities for real:

- Problem Solving
- Practice of judgment skills
- Reflection and inquiry
- Intuitive reasoning
- Interactive questioning
- Learning and practicing critical thinking skills
- Meaning exploration
- Understanding of relationships through the use of metaphor and similes
- Exploration of questions of values and feelings
- Exploration of the relationship of self to others

11. Foster intellectual freedom and encourage experimentation and creativity.

Adapted from Education & Counseling for Risk Reduction (ECRR) Curriculum, Center for Health Training (based on materials by Helmich J, in Making Connections: Teaching and the Human Brain. Renate M and Caine G., Addison Wesley Publishing Company, 1994).
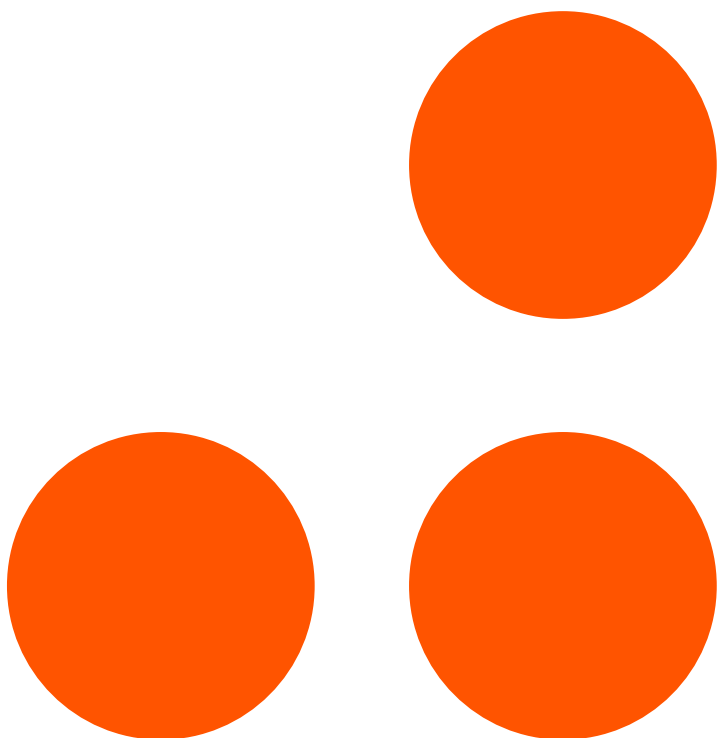
03: Learning Assumptions

Creating an effective training course requires that you know a little about your audience. Depending on the profile of the course participants, you can tailor the content accordingly. So, it's important that you not jump to assumptions. But why do we jump to making assumptions?

Well, mostly because it's easy. We take incomplete information about a situation, combine that with an unwillingness to ask questions, and then you subconsciously fill in the blanks. These blanks are YOUR interpretation of what you see or hear and usually drawn from your interpretation and past experiences.

Let me tell you my experience. During of my recent workshops to a group of certified accountants, I was explaining a specific financial concept. I assumed, because they're accounting professionals, they'd be familiar with the concept. Regretfully, my assumption was wrong. Yes, some heard about it but, none of them had any experience with it. Boy, did I have to adapt fast!

This example reminded me, an experienced trainer, that making assumptions is something we all fall back into and shouldn't, especially for participants in a training session.

Before I step into any workshop, I now make it a habit to follow these three things.

The first is to recognize every person has the potential to learn. Everyone learns at a different pace, but it doesn't mean they're not learning. Never assume slower learners are less intelligent and faster ones, smarter. Learning is a preference and speed is about how they learn rather than other factors like age or culture.

1. Potential to learn

The first thing is to recognize that:

- Every person has the potential to learn.
- Never assume slower learners are less intelligent and faster faster ones, smarter.
- Learning is a preference and speed is about how they learn.
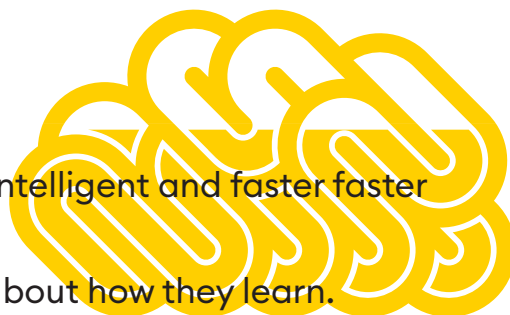
Second, as we age learning becomes more of a challenge and can cause anxiety and stress. Learning is also synonymous with change. This may lead to participants being more sensitive to failure and not to look foolish. Learning should be a comfortable experience not one to fear. I always try to create conditions that supports open exchanges, sharing of opinions, and problem-solving opportunities.

It's your responsibility to alleviate their apprehension and anxiety leading to increasing their motivation to learn. Foster a culture of trust, acceptance, and opportunities to exchange different ideas and values by including their experiences, observations, and feelings. This type of inclusion and varied perspectives will bring life to your session and their learning.

2. Learning is about change

- Acknowledge stress, anxiety, and confusion.
- Some anxiety's good; increases motivation to learn.
- Recognize anxiety causes barriers to learning.
- Create conditions for open exchanges, sharing of opinions, and problem-solving.
- Foster a culture of trust, acceptance, and opportunities to exchange ideas.
- Incorporate experience, observations, ideas, and feelings.
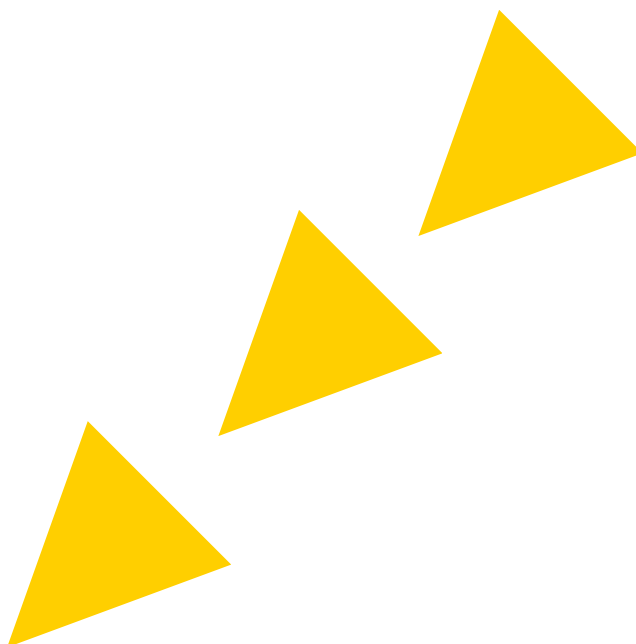
And finally, training is about getting your participants to adopt a new behavior. Learning is only the first step but it's not the destination. You'll have some participants who'll resist to adapting to the new world. It's only natural. To overcome this work closely with participants to develop plans to take action after they complete the course.

3. Help adopt behavior

Learning course content is only one step:
- Some will self motivate but most of the time they 'll resist.
- Overcome resistance and encourage behavioral change.
- Work with participants to develop plans to reinforce and apply the learning.

This is far from a complete list. But your first step is to acknowledge your own assumptions before stepping into any training session. Always question what you know and be open minded to new perceptions. I promise this will drive better and lasting learning experiences.

04: Motivating Adult Learners

Have you noticed how much around you attracts your attention? You may be focused on one thing but suddenly something happens and you're on to something else. It's true, we're more distracted than ever. Unfortunately, this distractedness will creep into your training sessions. So, it's essential to develop your ability to get people to focus and engage.

From my experience as a trainer, I'd like to share with you some tips on how to engage and motivate your learners.

Getting people to engage with the topic you're instructing requires something that grabs their attention. One way to get them to focus is to relate the training to the person's jobs responsibilities and their career progression.

Most of the time, your participants are taking your course out of selfish reasons and it's usually because it aligns with their career goals. Effective trainers will always make a connection between the course material and how it will help them in their job. They'll show participants tangible examples how their job could improve after completing the course or they'll draw in participants by getting them to share how they can see value form applying the skill.

1. Make it relatable

- Make a connection between the course and job.
- Relate new ideas and concepts using familiar examples.
- Share examples of how their job will improve after training.
- Share examples and testimonials from past participants.

Second, you need to build trust with participants. Trust is a powerful motivator. Think about it, did you ever apply anything you learned from someone you were skeptical about? Probably not. But I'm sure you applied things from those you trust implicitly. Bearn their trust by sharing your background, experiences, and how you've applied the content you want them to learn. While you may want to focus on your successes make sure to include times when you weren't too. It makes you more human to them.

2. Build trust

- Trust is a powerful process that reduces skepticism and cynicism.
- Share your background experiences, and how you've applied the content.
- Simply, lead by example.
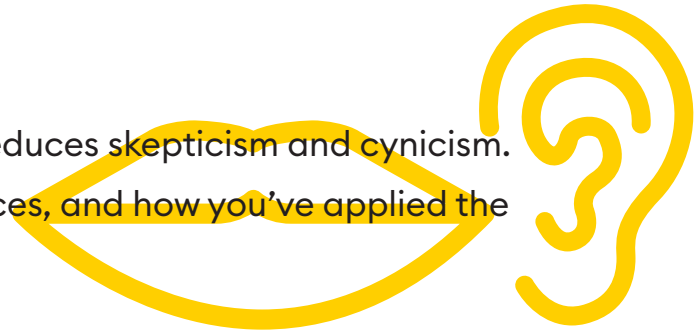
Finally, give the participants opportunities to explore and some control over their learning. Participants don't want someone systematically going through the content or one slide after another. They want to be involved with their learning. Allow them to become an active learner by giving them time to explore, experiment, and practice the new skills.

3. Allow exploration

Learning content is only one step:
- Give some control over learning.
- Allow opportunities to get involved and experience content first-hand.
- Avoid systematically going through the content.
- Foster an active learning culture.
- Permit opportunities to think, experience, and practice.
- Allow space for mistakes.
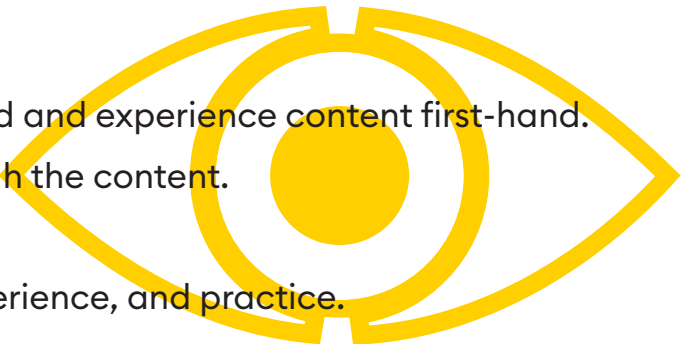
Good trainers know that the best learning opportunities is when mistakes occur. You can have the best designed course around but if your participants aren't focused and engaged it will fail to make a difference in their learning. So remember, keep the material relevant, build trust, and allow your participants to explore.

Exercise: Provide a Positive Learning Experience

Questions To Be Answered

What will we do to provide a valuable and positive learning experience for the participants?

Key Tasks

Select trainers to deliver the training (assuming it is classroom-based) who have:

- Expertise in the topic.
- Credibility with the participants.
- Teaching/facilitation skills and experience.

Prepare for delivery

- Prepare teaching and learning materials.
- Confirm all location logistics.
- Review notes and participant list.

Deliver the training

- Build rapport with and confirm needs of participants.
- Provide examples to help participants understand how to apply their lessons.
- Give participants follow-up materials and contacts for ongoing support.
- Evaluate training effectiveness.
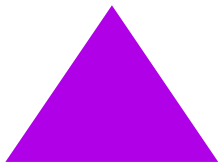
**What will we do to provide a valuable and
positive learning experience for the participants?**

When Selecting Trainers...

- Ask trainers to provide you with a resume or biography of professional experience to determine who is appropriate to provide training on particular topics. Provide some of this information in trainer bios for participants.

- Choose trainers who are genuinely excited about training their colleagues and who have experience doing training.

- If you have not seen a trainer in a training setting before, ask him or her how they plan to approach the topic and what methods they will use. Give suggestions if there are not enough interactive methods.

- Ask trainers you already know to recommend other clinicians as possible trainers–those they know that have expertise on certain topics; are good communicators; and preferably, dynamic speakers.

- Identify "experts" by referral from others whose judgment you trust.

- When possible and when your budget allows, pair trainers so that participants have the benefit of two experts.

- Work with trainers on their lessons and make sure they are creating lessons that are "teaching to" the learning objectives.

- Help prepare trainers by reviewing their notes, making copies of handouts and offering suggestions for exercises.

**What will we do to provide a valuable and
positive learning experience for the participants?**

When Preparing for Training Delivery

- Identify participant experience by sending a brief questionnaire to registrants before the training; give this information to the trainers.

- Add questions to registration form, e.g., number of years of experience as a clinician; one thing they want to learn from the training.

- Confirm that participants will be attending, three days before the first day of training.

- After reviewing information about participants, be sure the lessons are appropriate to their expertise and needs.

- Develop a checklist of materials and bring it to the training.

- Make arrangements for printing, binding, and transportation of course materials well in advance of the training.

- Request a sample handout from a trainer to be sure the materials meet the learning outcomes.

- Assess the physical environment prior to training. Check room layout, equipment, table set up, etc.

- Make sure you are familiar with equipment, or have a technical person on site to assist you.

- Prepare a back-up plan. What if the equipment doesn't arrive? What if there aren't enough training materials? What if the electricity doesn't work?

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Questions To Be Answered

What will we do to provide a valuable and positive learning experience for the participants?

When Delivering the Training...

- Try to provide a 20-minute break approximately every 90 minutes and allow at least one hour for lunch.

- Write questions that arise on a piece of flipchart paper and use as a summary at the end of the training.

- Use case studies and real clinical examples, when possible.

- Check in with participants and ask them if they need a break.

- During breaks, make yourself available to answer questions.

- Move around the room instead of staying in one place, especially for group activities.

- Ask participants questions about their clinical experience. These are invitations to share what they know and their expertise with their colleagues.

- Refer back to comments that participants have made and use their name. This reinforces participant involvement and highlights important comments made by participants. It also strengthens the interpersonal relationship between you and the participants.

Preparing the Training Session

01: Developing Learning Objectives

Have you ever tried to build or assemble an item? You know, like an Ikea desk or something like that? If you're like me, you look at the picture and think you can put it together without the instructions. By the end, I wasted a lot of time, I'm frustrated, have extra parts and worse, it doesn't look like the picture.

This is what it's like when a course lack learning objectives. Participants show up and expect you to help them develop their skills for a purpose. And it's this purpose that most likely attracted them to the course.

Identifying and developing precise learning objectives assures the participants they know what they know what to focus on to be successful. But it's more than setting up a list of items they need to learn, you need to make it purposeful too.

A tool I apply regularly to ensure my learning objectives are always relevant and actionable is to apply the ABCD model. The "A" is about knowing your audience; "B" is defining the behavior you expect to see; "C" is for stating the conditions for how participants apply the knowledge; And "D" is the degree of knowledge they require.

The ABCD Model

- **A...** Know your **A**UDIENCE
- **B...** Define expected **B**EHAVIOR
- **C...** Specify the **C**ONDITIONS
- **D...** **D**EGREE of knowledge required
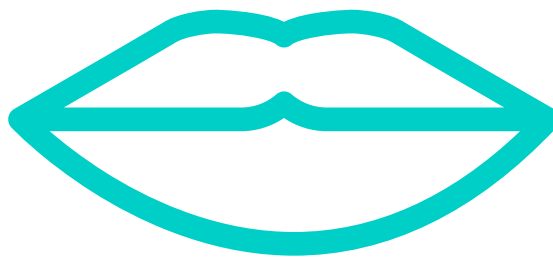
Here's a quick example. Say you're teaching a PowerPoint course. One learning objective would be, "The administrative staff will be able to incorporate basic text animation for bullet points within a new PowerPoint slide layout." Applying the ABCD model helps you to develop well thought out learning objectives.

But using ABCD is only the start. Impactful trainers consider the following:

First, they recognize that learning objectives help participants understand what to expect at a high level. But it's up to you to make sure that the objectives resonate with the participants by making it relevant and timely.

Second, these trainers review the objectives to determine how to assess their participant's learning progress. They come to your session to learn but how do you know they're learning and learning the right stuff? Well-crafted learning objectives give trainers opportunities to assess participant performance. It also helps you to maintain focus on the core concepts.

Assessing Learning

Learning objectives should:

- Assess participant learning.
- Measure performance relating to the objectives.
- Keep trainer's focus on assessing core concepts.
- Engage participants with a greater sense of control and what's relevant.

Third, effective trainers will leverage the objectives to engage their participants. They'll flex the objectives to allow their participants to feel more in control of what they're learning and what they should be focusing on.

Lastly, good trainers will make sure to align the learning objectives with performance outcomes. This point aligns well with assessing a participant's learning progress and is the subsequent step to ensuring learning success. Training's purpose is to make employees more effective in their jobs. Good trainers will always focus on improving participant performance throughout the course.

Training's Purpose

- Align with performance expectations.
- Make employees more effective in their jobs.
- Focus diligently on improving participant performance.

Learning objectives is fundamentally about focusing participant on the right learning areas. Never leave out, or worse, underestimate the power of effective learning objectives. Learning is not just about the journey but ultimately, it's about helping participants reach their destination.

02 Creating a Session Plan

Have you ever participated in a course where time passed quickly and before you know it was done? Or maybe, like me, you've in a class that just dragged on forever. Maybe you were conducting a session that you thought was a disaster and not sure you participants learned what they were supposed to.

Chances are in the good sessions the trainer had a well laid out plan, and the others...well, they just didn't have one or it wasn't thought through.

What is a Session Plan

- Organizes activities and resources you 'll use to guide participants toward a specific learning objective.

Trainers who create positive learning experiences plan out their sessions well in advance and in some detail. They do this by creating a session or learning plan. This plan helps structure and organize the resources, activities, and time needed to help participants achieve a set of learning objectives.

Every time I create a session plan, I always apply these five points:

First, and you've heard me say this before, you must clearly define the session's learning objectives and make sure that they're meaningful. Remember, this is not a list of items to check off but rather specific objectives of what you want your participants to apply when they complete the course.

1. Define the Session's Learning Objectives

- Simply specify what participants must learn upon course completion.
- Not a shopping list of items rather, it's a list of items to focus participants.
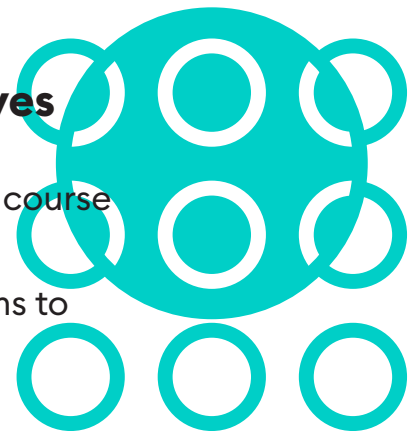
Second, I make sure to clearly identify and define core topics and related concepts. I do this by first finding related themes. Then I list the relevant points under each theme I need to address and the order I need to address them. It's like a roadmap logically explaining related concepts that support your learning objectives. I'll try to learn about my participants existing level of knowledge and skills so I can better align the topics with their needs. Doing this one additional step will help participants to retain it better.
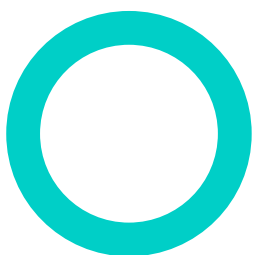
2. Define Key Topic and Related Concepts

- Identify core topics and group into familiar themes.
- List all of the points and the order you 'll cover them.
- Align your plan with participants existing skills and knowledge.

Third, I consider how I'll instruct the content. The goal is to get participants to engage in the topic by using one or several different methods and trying to use them in different ways. This is an opportunity for your to be creative. Consider interactive approaches that gets them up and about. It can be something simple as a plenary and group discussion or maybe group teachings or the use of online tools. Don't limit yourself but make sure the tool you use fits the content you're instructing. Then make note of it in your session plan.

3. How Will You Teach

- Engage using and applying several different approaches.
- Be creative and use a variety of tools.
- Note when and how you'll use the tools.

Fourth, and it's something I always come back to and that's incorporating ways to assess that participants' are actually learning the skills. Be sure to include assessments into the plan that help to monitor their learning progress. Many will conduct some sort of pre-assessment to set a benchmark about what they know, continually assess them during the session, then assess them after the session.

4. Assess Participants are Learning

- Build in methods to check learning progress.
- Pre-assess participants on what they know.
- Assess before, during and after the session.

Finally, manage your time. This is one resource many trainers don't pay attention to. But they are also the ones that always seem to be rushing to get everything in with little regard to participant learning. You only have so much time so use it wisely. Some activities and topics may take more time to master than others. Allow time for participants to practice.

5. Consider the Timing

- Plan for concepts or skills that may take more time to master.
- Identify these skills up front and incorporate extra time.
- Record the time allocated for each section.
- Allowed plenty of time to focus on core concepts.

Your training session plan is your guide. It is your thought process to ensuring you address the needs and resource to creating a well though out learning experience. To help you out, I've provided a sample session plan in your exercise files to get you started.

03: Organizing and Structuring Content

The first time I renovated was to complete the basement in my first house. And guess what? I had to do it again a few years later because I didn't know what I was doing. The second time around I planned and accounted for the resources, material, and time I needed to do a better job.

This is why effective trainers look so good. They pay attention to the course details, so it flows effortlessly. Let's dive into the four elements to plan and organize for an effective training session.

The first step is to define the start, middle, and conclusion for the course. Now, this may sound like common sense, but you'd be surprised how often this doesn't cross a trainer's mind. It's possible they avoid it because they believe the material is already laid out, so they don't have to worry about it.

What I see most of the time is what I refer to as 'trainer arrogance' meaning they think they know the material well enough that they don't need to plan or prepare. Trust me, a lack of preparation is very noticeable. Planning sends a message that you care about your participants success.

Second, you want to set yourself up to present a good first impression. Trainer's call this setting the stage and it's where you establish the course tone and personality. When done well, it also helps participants to feel at ease reducing their anxiety learning about your qualifications and course expectations.

Setting the Stage

- Consider your first impression.
- Sets the tone and personality.
- Helps participants become comfortable.
- Establishes your credibility.
- Take the time to know them.
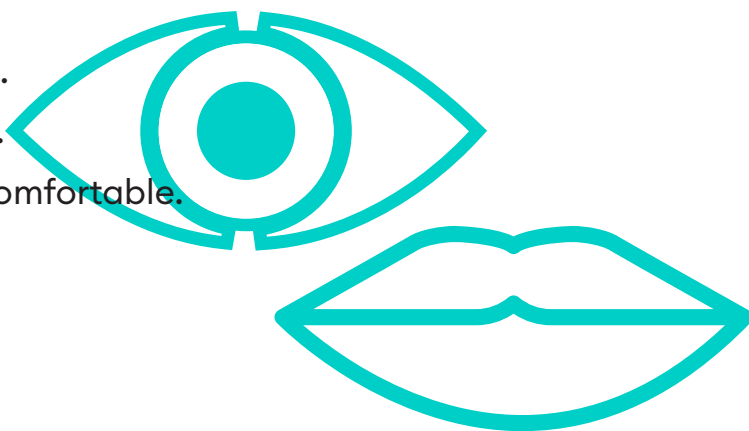
But don't drone on about who you are, this is their session. Focus on to them. Get them to introduce themselves and share why they're in the course. Here's what I do, have them state one thing they'd like learn from being here. This helps you learn who's in the room and their backgrounds, but it also makes them feel respected reducing the potential learning resistance you may encounter.

The third point is something many trainers overlook and that's reviewing housekeeping items. You may not see the importance, but your participants do. Review the agenda so they're clear on how you'll get them to the destination. Use your learning objectives to make these tangible connections.

Review "Housekeeping" Items

- Go over the agenda
- Review learning objectives.
- Explain guidelines.
- Establish the session culture.
- Address breaks, washrooms, and refreshments.

One thing I like to do is to establish a session culture. I explain how I apply the military rule where no participant is left behind. I remind them that every person in the room approaches learning uniquely. There are times some will struggle, including themselves, and so I expect everyone to step up and support each other.

And of course, don't leave out items relevant to participants, like breaks, washrooms, and refreshments. Then, stick to the schedule.

The fourth element is organizing the session content, so participants don't feel overwhelmed. You're not there to cram everything into their heads; you're there to focus on relevant points and make it a comfortable experience. Structure the content into common themes or topic areas. Allow them time and opportunities to practice the skills through various interactive activities.

Organizing Content

- Break content down into common themes.
- Add related key subpoints under each theme.
- Focus on what to learn and not on everything.
- Offer opportunities to apply the skills.
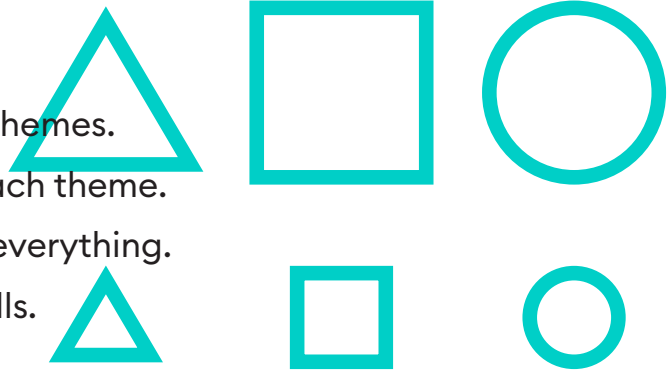
And finally, make sure they leave felling positive and confident. This is easy because you know the skills they must leave with when they complete the course.

Then work backwards from this point and modify accordingly including what you learned about them from setting the stage. And of course, before concluding, give participants time to reflect, ask questions, and check off that wish list they provided at the start of the course.

End on a Positive Note

- Know where you want to take participants.
- Give time to gather thoughts, ask questions, and resolve outstanding issues.
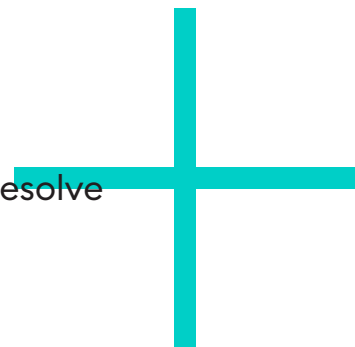
Don't be one of those trainer's that 'spray and pray', you know, dumping large amounts of content hoping something sticks? Take the time to review, organize, and structure the course content. Then use this plan that will make your participants successful.

04: Developing Proper Communication Skills

Think back to a time when you learned something that came easy to you. I do and it wasn't because I was smarter than other but probably a result of the teacher's skill to getting students involved.

Those trainer's that make learning look easy are most likely applying a systematic technique known as Gagne's Nine Events of Instruction. Let's cover each one.

The first event is to get your participant's attention. This is about coming up with a compelling introduction. You can begin with a current issue they are facing, interesting stories that relate to their learning journey, or doing something simple like asking an interesting question to get them to think. During my problem-solving workshops I get them to work together to solve a riddle – everyone loves a riddle. It even acts as an icebreaker when you get people working together.

Gagne's second event is to clearly state the course goals. Whenever possible, tie them to their situation or real-world situations. This gives them an implicit reason to participate. One way to do this is to review each learning objective making a direct connection to work or job examples. This makes it immediately relevant and eliminates the underlying 'why am I even here' question.

The third event is getting participants to apply the skill. When starting an activity or topic be clear as to what the outcome you expect to see. Engage them by asking how they could apply this outcome to their work. Doing this one small step gets them to see the relevance and encourages them to make it a habit.

Gagne's fourth event is to create objective-focused learning content. This means making a connection between the learning activity and content to the learning objectives. This is why it's essential for you to group content into common themes. This way you can direct participant attention on mastering one core objective before moving on to the next.

The fifth event is to provide guidance. The learning process is about supporting some type of change. This can be scary even if they don't admit it. This where you need to transition to a facilitation role to allow them to experience the new skill on their own but knowing you're supporting them. If you don't do this expect them to be frustrated and disengaged from the learning experience. Support participants coaching them during and after the session.

Gagne's sixth event is to incorporate opportunities to practice. Combine applying repetition with practice within simulated real-world opportunities. Challenge them further each time and be sure to reward accordingly.

The seventh event is providing feedback. Again, this sounds like common sense but providing appropriate and relevant feedback that many trainers don't do very well. Your participants are there to learn but they can't learn if they don't know how well they're doing. Take time to offer balanced and target feedback.

The eighth learning event is to assess learning progress. Evaluating how participants are progressing gives you a measure about how to direct your approach and to revisit areas where participants require more attention. If you see people are challenged, find a new or different approach to instruct the content.

And finally, Gagne's ninth event is tying learning to real-world applications. Again, make it relatable to their jobs and performance expectation. This will ensure they remain engaged.

That teacher that helped you to lean something quickly went past the content. They found ways to make real connections with their participants applying many of Gagne's events delivering the content. If they did, you should too. Be sure to incorporate these nine points in your next session.

TIPS: Gagne's Nine Events

1. Gagne's first: Gain attention

- Hook participants with a compelling introduction.
- Use stories relating to their experiences.
- Ask a question that gets them to think or surprises them.

2. Gagne's second: State Objectives

- Clearly state course goals.
- Applying to real-world situations to actively participate.
- Address the what's in it for me question.

3. Gagne's third: apply knowledge

- State the skills or knowledge they'll apply and relate it to something they know.
- Use positive approaches to help make the new skill become a habit.

4. Gagne's fourth: objective-focused

- Tie learning activities to learning objectives.
- Group concepts together based on a specific objective.
- Allow participants to master the topic before moving on to the next.

5. Gagne's fifth: Guidance

- Support to learn new skills and knowledge.
- Support by coaching during and after the session.

6. Gagne's sixth: Practice

- Incorporate ways participants can practice new skills.
- Repetition is proven to get participants to absorb and retain.
- Allow plenty of simulated real-world opportunities to apply the knowledge.
- Challenge and be sure to reward accordingly.

7. Gagne's seventh: Feedback

- Provide timely feedback.
- Feedback improves behaviors and develop strengths.
- Offer balanced and individual feedback.

8. Gagne's eighth: Progress

- Assessing helps gauge participant progress and identify weak areas in content delivery.
- Consider using different and various approaches to your delivery.

9. Gagne's ninth: Real situations

- Make sure you continually tie the new skills back to the participants' work.
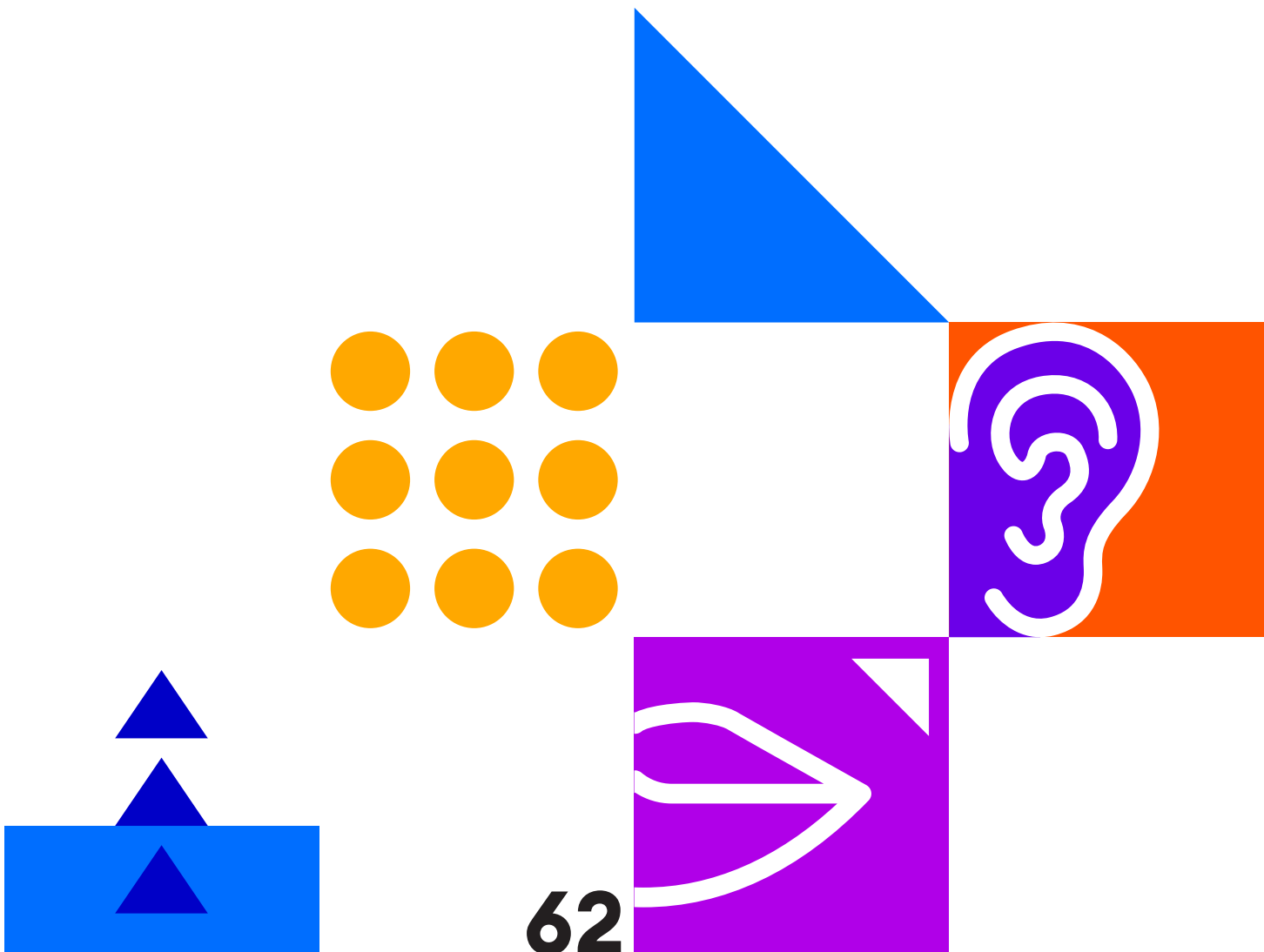
Developing Effective Communication

01: Develop Effective Communication Skills

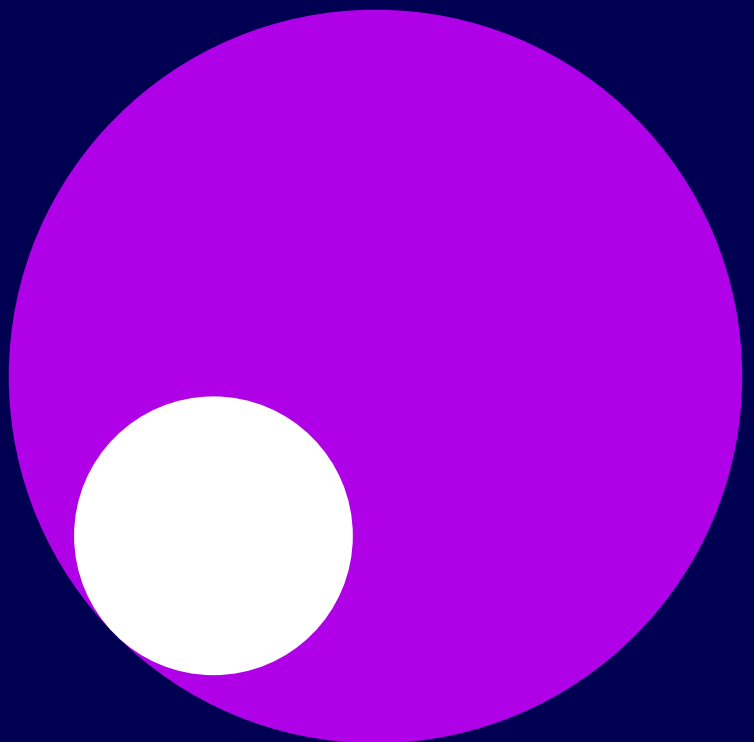The one skill every trainer should do well is to communicate effectively. Even if you're not a professional trainer, everyone enjoys speaking with someone that can convey a clear message.

But communication clarity is more about respecting the audience with compassion, empathy and being direct.

Effective communicators approach communication as a one-to-one process, even when they address a large group. Making it an individual conversation implicitly conveys you care about how the message affects the other person.

Effective trainers do this by planning and preparing what they'll say and how they present it. Let's look at each in more detail:

First is planning what you're want to say. Just because the content maybe written out doesn't give you permission to be lazy reading a script. You'll want to personalize the message for yourself, to better appreciate how and when you'll say it. Learn what participants require then, structure the message to address those needs, and finally, find ways to deliver it appropriately.

Let's assume I'm training new technology to a group of experienced programmers. I need to know what's their level of technical knowledge and also the depth of their experience. Then, I'll plan to have them practice using the technology on their workstations addressing their needs rather than lecturing to it.

Next, prepare the message you want to say. Again, this isn't the time to recite what's in the content word for word. Your role is to match participant needs with content they can relate to. You don't want to be THAT trainer where people say things like, 'I already know that', or, 'why would I need to know that?' If they do then it shows your lack of preparation and also, a lack of caring.

Prepare your message with a warm welcome and focus on explaining the key learning objectives. Balance your learning message with a mix of theory, practicality, and context. Then conclude by reminding them why they came to the session and how they can apply the skills in their roles.

Finally, it's show time, you know...time to present? Effectively presenting your message is about three items: first, is how you address the content. Your participants are taking in a lot of information so always use short, simple phrases and avoid jargon and acronyms.

Second, coordinate your non-verbal cues with the message. Your body language and verbal message should always match. For example, when a participant asks a question, avoid backing away. This non-verbal cue expresses a lack of confidence. What you should do is to approach them when answering. This will show confidence and that you're giving them complete attention.

And lastly, using appropriate visual support to convey what you're saying. I really like PowerPoint, but I also hate when people always use it as their 'go-to' visual support. And even then, their slides aren't very good...but that's not PowerPoint's fault. PowerPoint isn't the only way to offer visual reinforcement! Be creative and try different things like hands-on examples, demonstrations, and even telling a descriptive story. It's all about reinforcement and participant engagement.

Delivering content, especially training content, is more than showing up and reading your notes. Good trainers prepare well in advance moulding and adapting the content to meet the needs of their participants. They care and so should you. Take the time you need to make your content fit the needs of your audience.
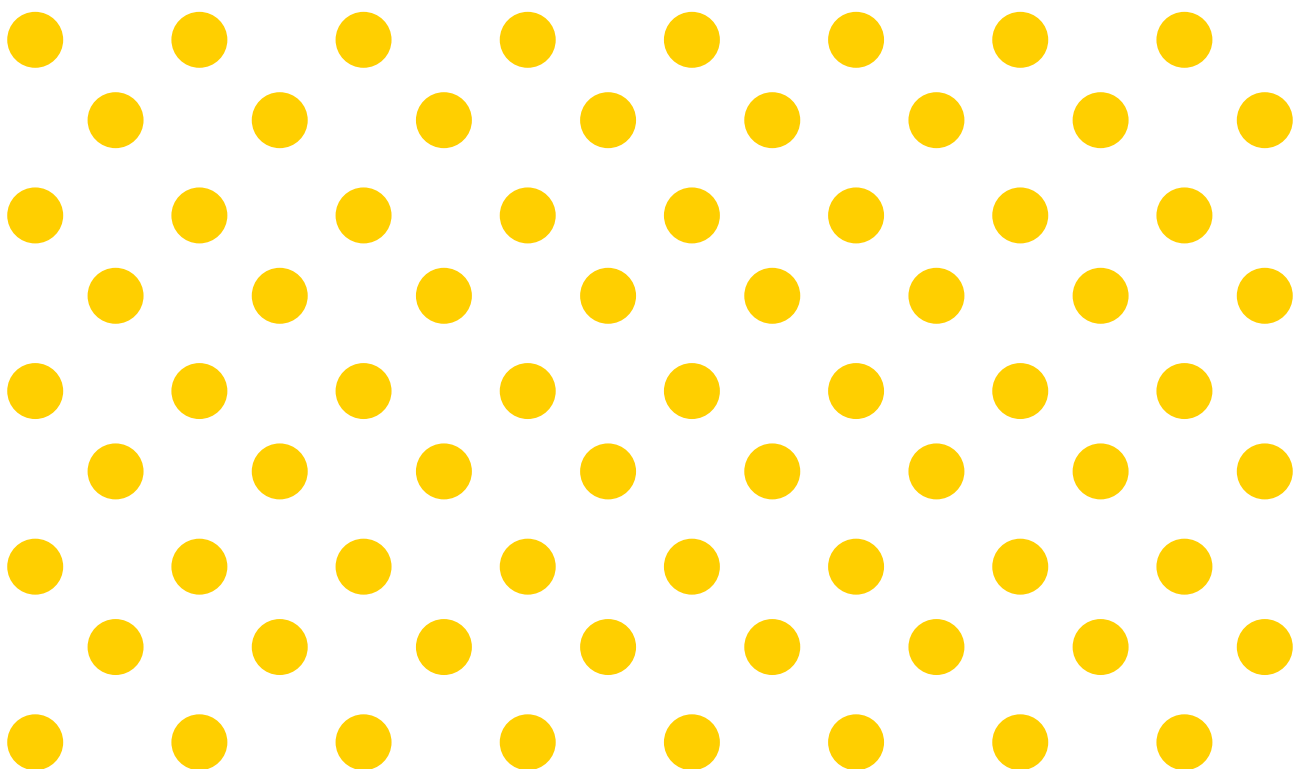
TIPS: Becoming an Effective Communicator

Whether you are giving a speech, leading a workshop, or talking one-to-one with a patient or family member, your goal is to be a clear and effective communicator. The secret of good communication is remembering that the audience is more important than the topic. People want you to care about them, and most of them hunger for honest information from someone who tells the truth in plain language.

- All communication is one-to-one.
- Even speaking to an audience means speaking to a collection of individuals.
- Show people you care by helping them to see the meaning and value of the information you are sharing and how it affects their professional lives.

The following are helpful hints on planning, preparing, and presenting a message to a group of individuals.

Planning Your Message

1. Audience

- Who is in the audience?
- What do they have in common? You with them?
- What are their wants, worries, and questions?
- How long do you have?
- What is your own purpose? What response do you want from them when you finish?

2. Message

- In 25 words or less, what is the most important thing you want the audience to remember or do as a result of your communication?

3. Visual Aids

- Will you use visual aids?
- What kind? (PowerPoint, flip chart, acetates, chalk board, other)
- Will you use props and/or printed handouts?

Preparing your Message

4. Opening

When beginning your presentation, plan to:

- Greet people warmly.
- Get the attention of your audience–state a question or share a personal experience.
- Preview what is coming– promise people what they will get from listening to you or talking with you.
- Give your name after the question or promise (or before if that seems a better time).
- Offer people some information about your professional and personal qualifications.
- Let people know if you want to hear questions during or after your presentation. Note: It can make for a richer learning experience if you answer questions during your lesson.

5. Presentation Body

You can build your presentation around different organizing themes such as:

- The questions your audience is likely to have.
- A time structure (past, present, future).
- A problem-solution approach (your subject today, the problem, solution(s), benefits).
- A decision-making approach (state an opinion or suggestion, offer an opposite view, give evidence to support the first opinion or suggestion, and restate it in a new way).

If you use statistics:

- Don't overuse them.
- Give a source.
- Use up-to-date information.
- Round up or down.
- Present numbers visually if over four figures long.
- Turn facts into pictures when possible.
- As you speak, illustrate your points by sharing examples.

6. Conclusion

When concluding your presentation, plan to:

- Summarize the main points.
- Invite or encourage people to act–to put what they have learned into practice.
- Suggest some next steps they can take to learn more about their topic; ask participants for ideas about how they can learn more.
- Write a strong final line that alerts people that you are finished and ends your presentation on a positive note of hope.
- End on time.

Presenting Your Message

7. Delivery

- Use your plans from #4 under Preparing Your Message. In addition:
- Speak in short phrases in terms your audience understands.
- Emphasize key ideas.

  Define and translate technical terms and statistics.
- Use a conversational tone of voice.
- Control the volume of your voice.
- Involve your audience with questions, handouts, or interactive exercises.
- Show respect for each person during the question-and-answer period.
- Be courteous to hostile or difficult individuals.
- Repeat all questions before answering them in a large group.
- Transition from one main idea to another using:

  Words: "therefore," "according to."

  Phrases: "as I explained earlier," "on the one hand"

  Sentences: "Let's look at another point of view." "Here is another way of looking at this."
- At the end, use your conclusion plans from #6 under Preparing Your Message.

8. Body Language

- Stand rather than sit– if you are able–while speaking.
- If standing, plant your feet firmly on the floor; stand tall.
- Stand at ease and show a friendly face.
- If you are sitting when you speak, lean forward slightly, from the waist with a straight back.
- Use your hands to communicate.
- Look and see the audience when you speak to them.
- Convey energy and enthusiasm for the topic.
- Wear clothing that makes you feel comfortable and effective and shows respect for your audience.
- Use verbal focusing techniques such as signposting (showing with your hands the number of points or ideas you want to highlight) or the inserted question ("So, what does all this tell us about adherence to treatment?").

9. Visual Aids

- Locate and test equipment and lights in advance.
- Place visual aids where they can be seen and display only when ready to discuss them.
- Display key words rather than sentences.
- Use lettering large enough to be seen on a flip chart and a white board.
- Use graphic devices for clarity (borders, bullets, boxes).
- Add images as well as words (put images at top or left and text to the right).
- Use a pointer (roll a large piece of paper, hold with rubber bands, and color the tip).
- Show slide for five seconds before you speak.
- Talk to the group, not the screen.
- Don't sacrifice learning through discussion to passive learning through technology.

02: Body Language (non-verbal cues)

Was there a time when you were speaking with someone and you felt like they were lying to you? What they were saying from your point of view didn't seem right? Chances are their body language just didn't match up with their message.

Most don't realize that our non-verbal cues, or what people call body language, makes up the majority of the message we're saying. The best trainers are very aware about their non-verbal cues. They know everyone is hanging on their every word so, what they say must match up with what they're doing and how they behave.

Good trainers are also pay close attention to their participant's body language. They observe the reactions of people they're addressing and adapt their message accordingly. It's clear this is a skill every trainer must have.

Here are the four most common non-verbal cues you should pay attention to when training:

First, always convey a confident first impression. Your participants are nervous and don't know what to expect. They're looking to you for reassurance. Naturally, you can speak to it but if you don't show confidence through your actions, they won't buy it.

Confidence comes through knowing the content well but adding to your presence also helps. Stand tall with your shoulders back. Come in with a smile. And speak in slow, clear, concise phrases. Doing these small things will reduce participant stress.

The next cue is about participant body language. You know they'll be resistant to learning something new and possibly somewhat defensive.

When people get defensive, they tend to tune out or disengage. How can you tell? Some non-verbal cues include: crossing their arms; showing disinterest with little facial expressions; they may physically turn away; or they avoid eye contact.

Recognizing these cues allows you an opportunity to adjust your message and help to immediately get them re-engaged in the session. As the session moves on you'll see them becoming more comfortable engaging with you.

Next, have you ever been in a situation where people seemed bored with what you were saying? You probably caught on to some of the disengagement cues.

In a perfect world you'd want every participant to be fully engaged. In reality, this is a big challenge for trainers. But engaging participants is in your control so you need to quickly clue in when they're not engaged.

Common non-verbal cues include: a person's head is down; their eyes are glazed, or they're gazing at something else; they're fiddling or doodling; or they just don't look confident.

Re-engage them by asking the person a direct question or changing the activity. But keep in mind, engagement breeds engagement...you need to show you're fully engage too.

One last note don't generalizing non-verbal signals. It's different for each person and usually dependent on past experiences and cultural backgrounds. For example, participants I instruct from traditional Asian cultures rarely question me. They listen with intent. At first, I read this cue as disengagement only to realize they were fully engaged but don't interrupt out of respect for my role.

I always get asked how to improve this important skill. My reply is to engage in people-watching. Watch how people interact with each other and try to interpret their behaviors. This will sharpen reading body language skills and help you to better interact with your audience.
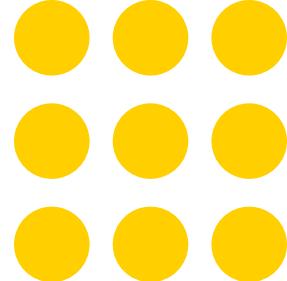
Exercise: Non-Verbal Cues to Learner Engagement

Use this checklist to assess the level of learner engagement and non-verbal behaviour during your class.

The behaviors at the top of the list indicate a positive level of engagement, so the desired answer is "yes."

The behaviors shaded in grey at the bottom of the list indicate low levels of engagement, so the desired answer is "no"

Verbal and Non-Verbal Cues	Yes	No
Nods head		
Smiles or makes eye contact		
Looks interested		
Asks relevant questions		
Leans forward		
Shares experience		
Tries activities or assignments on their own		
Adds relevant information to the topic		
Drums fingers		
Shrugs or yawns		
Talks to neighbor, easily distracted		
Closes eyes		
Looks away or stares		
Crosses arms or legs		
Rests head in palm of hand		
Comes to class late		

03: Creating a Learning Culture

People take learning for granted. Even many seasoned trainers will simply walk into a session and just start training!

As I've said previously, you need to set yourself up for success before you jumping into your session. But this set up is more than just introducing yourself and stating the course objectives. It's more about getting your participants to want to learn and supporting their journey.

What you're attempting to establish is a learning culture. This is something that I focus on before and during every session I deliver. Fostering a learning culture helps to clearly define context, expectations, and guidelines for the session that underpins a supportive learning environment. Simply, you're creating a safe space that encourages learning.

Developing a learning culture requires addressing four things:

The **first** thing I write up is a training session mission. My objective is to get everyone to focus on one goal. During my prep, I list key points that sum up what the session is about. Then, I write up a short paragraph that includes these points. Trust me, you'll have several iterations before getting to one that does the trick.

For example, the mission for this course would be, "to develop and apply a set of relevant learning transfer skills for aspiring trainers and subject-experts so they can effectively transfer the application of learning to subsequently assist their session participants to improve their job performance."

The **second** point is about making sure every participant is learning. I get participants to make me one promise, and that's not to leave anyone behind. This alone is huge commitment and I explicitly remind them of that. I also mention that it's not a competition – we're all here for the same reason – and that it may be them that needs the support. I also tell them it's a selfish act – what better way to confirm their mastery of the topic but to teach someone else.

The **third** point is to gain their confidence and they're in a safe space to take chances, experiment, and ask any question they want without judgement. But this requires getting everyone to agree and promise to keep what happens in the session only to remain in the session.

I continually remind them that they're here to learn. This means acknowledging what you don't know...not to try and look smarter than anyone else. This is what I refer to as a self-recognition of ignorance. Accepting this gets people to focus on what they need to learn.

And finally, I always try to empower participants. Like I've said before, this is about their learning and not about you lecturing and repeating things over and differently. Let them take control and of the learning taking place. This is when they'll take ownership and find ways to apply the new skills for their needs.

So, you have two choices, you can be the trainer that walks into a session and flips through PowerPoint slides, or you can create an environment that gets your participants to embrace and pull learning from their time in the session. In my experience, every time I apply these culture guidelines the learning always increases dramatically.

TIPS: Guide to Fostering a Learning Culture

1. State the session's mission

- Summarize in a paragraph the session's intent and goals

2. No one left behind

- expect that participants step up to support their peers
- remind that it could be them requiring help.

3. Engage Your Audience

- Signs of disengagement:
- Head is down
- Eyes are glazed, or gazing elsewhere
- Distracted or fiddling with items
- Body is not upright and confident.
- Show you're engaged as well

4. Foster a Safe Place

- Risk taking
- Experimenting
- Asking question
- Never passing judgement
- Respecting confidence

5. Recognize What You Don't Know

- you don't know what you don't know
- Acknowledge what to learn

6. Empower Learning

- Stop lecturing and repeat the same things over and differently
- Allow participants to leverage their own learning experience
- Provide various opportunities to take control of the knowledge

04: Questioning for Effective Learning

In my experience, I always cringe when I hear a trainer ask the token, "are there any questions?" This is a huge, missed assessment opportunity to find out whether participants learned anything or if your training fell on deaf ears.

Experienced trainers always prepare relevant question in advance. This one element helps participants leave your session with confidence.

Here are some ways you can make this happen:

First, ask yourself, what do you want to gain by asking questions? Preparing valid questions requires work and should always connect with the learning objectives.

For example, let's say a learning objective for a Word course is to set up custom page margins. While preparing, you'd identify specific elements within the learning objectives you want to assess. So, this means your objectives must be clear and relevant.

Once you've identified these elements you can know design the questions to ask. Be sure to sequence the questions with the learning objectives so you don't confuse participants but also allow yourself latitude to adapt depending on how they answer.

Second, try to ask more open-ended questions. These types of question require an explanation and avoid the dreaded yes or no answer. Your question should begin with a: who, what, when, where, why and how.

For example, instead of asking, "Do you know how to set up a paragraph tab in Word?" ask, "What are the steps to set up paragraph tabs in Word?" Their response will either confirm their understanding, provide you an opportunity to correct, or allow you to revisit the topic.

Next, always ask one question at a time. I know, this sounds like a no-brainer, but you'd be surprise how often I see trainers bundle up multiple questions. Bundling or asking multiple questions at once will guarantee confusion.

For example, instead of asking, "Why would you use an averaging formula in Excel over standard deviation and how will it make a difference to the final decision?" ask, "Why is an averaging formula appropriate to calculating the result?" "When would you decide to apply a standard deviation formula?" and "How will using one formula over the other make a difference to the final decision?" Now, do you see how powerful this one change is?

Fourth, always ask questions that relate back to their role and work. These are called empowering questions and it gets participants engaged by seeing how the new skill relates to their needs.

For example, "Based on your experience, how would you use the PowerPoint animation function the next time you have to deliver a presentation?" is a good way to get them to think about and situates the next time they need to apply this skill.

Fifth, always **ask for clarification when you're unclear about** a participant's answer. If you're not sure they understand properly or if they didn't express themselves clearly don't be afraid to ask them to clarify. Ask follow up questions, like, "Can you provide me with more detail?" or "What specifically is challenging you?"

One more thing, and this isn't about the questions you ask. It's about being an active listener. Being a good listener will help you to ask better questions. And people are more willing to open up to those who listen well. So, ask your questions and then give them time they need to answer. Ask a follow up and give them more time. Trust me, they'll give you all the answers you want – and more.
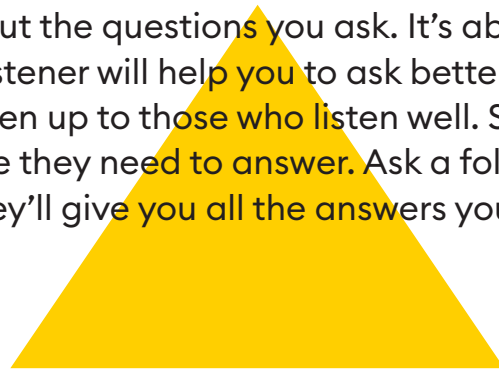
TIPS: Creating Knowledge Test Questions

1. Create questions that focus on the primary course objectives.

- Try to develop at least one question that tests participants for each course objective. This will ensure that you are asking participants to demonstrate their knowledge of what course developers determined are the most important concepts to learn across the entire course.

- Go one step further and ask yourself, "What ten crucial things in this course cover what a learner–needs to know?"

- Then create your questions from this list of ten concepts, facts, or skills.

2. Only develop questions to which there are clear answers during the course

- Do not test participants on concepts or knowledge that were not sufficiently covered in the course.

- There may be important questions that you want to include in the knowledge test that were not adequately covered.

- Integrate this information the next time you teach the course; leave it out of the knowledge test.

- Create questions that don't demand the memorization of extraneous detail.

- Participants should not be tested on whether they remember a particular word or phrase but rather on whether they have learned important concepts and facts related to the subject matter.

- Fill-in questions that are after a particular word or phrase are examples of this kind of "how's your memory?" question. They should generally be avoided unless you provide a list of words to choose from.

3. Develop a test that will take between 10 and 20 minutes to complete.

- Completing a pre and post-test can take time away from covering material in the course.

- In addition, at the end of training, there is often very little time to devote to having participants complete a post-test.

- Pre- and post-tests are not supposed to be exhaustive of the material addressed in the course but be a sample of the most important concepts and skills covered.

- Aim for a knowledge test that would take an average participant approximately 15 minutes to complete.

- This usually translates into the equivalent of approximately 15-20 multiple-choice and true/false questions.

- If you add short answer or essay questions, you should allow for 25 minutes.

4. Have a balanced mix of True/False and Multiple-Choice questions.

- Having a variety of knowledge questions can help make a test more rigorous and interesting.

- Multiple-choice questions ask respondents to select among several possible answers, whereas true/false questions ask respondents to consider only two possible choices.

- You can also ask respondents to demonstrate more specific, detail-oriented learning with multiple-choice questions.

- An excellent way to test respondents' abilities to analyze what they've learned and go beyond fact-based assessment is to use "best answer" multiple-choice questions.

5. Construct questions that are simply worded, to the point, and unambiguous.

- Simple sentences are straightforward and have fewer words than more complex, multi-phrase sentences.

- Vocabulary that can be interpreted in different ways makes it much more difficult for respondents to answer.

6. Stay away from conjunctions such as "and," "but," "except," and "or."

- These words imply a second idea or concept and can be confusing when respondents are answering True/False questions.

7. Develop responses that are substantively distinct from one another.

- Answers in a multiple-choice question that are too similar don't provide a respondent with a clear choice.
- Such questions can end up testing their ability to make distinctions in spelling or definition instead of making important discerning choices among crucial concepts.

8. Develop "incorrect" responses that are potentially plausible but clearly wrong.

- Even your most knowledgeable learners should not find the correct answer extremely obvious; respondents should be presented with a selection of answers that they must consider carefully.

9. Avoid items with more than one correct answer

- Avoid using "both A and C are correct" as options.
- Avoid "All" and "None of the above" as options.

10. Make the question text longer than the text of the answers

- Most of the information should be in the question, not the answers.
- Participants should not be overwhelmed with words when attempting to answer the question correctly.

11. Review your questions and answers for usability.

- Cover up the answers and look at the question: You should be able to answer the question without looking at the answers.
- Cover up the questions and look at the answers: You should not be able to say which answer is correct.

12. Consider developing Case Multiple Choice questions that ask respondents to apply what they've learned.

- Multiple-choice questions are usually not used to test applied knowledge, but they can be. Such a question has a case stem, lead-in question, and possible responses.
- Case multiple choice questions challenge respondents to answer a problem using knowledge they have learned in a course. The case should not give away the answer, nor should the answer be obvious among the possible options.

Exercise: Effective Questions Template

Writing Training Evaluation Questions: Worksheet

Based on the 4 levels of evaluation: (1-Reaction, 2-Learning, 3-Behavior, 4-Results or Impact), respond to the following three questions.

A. Develop two questions each at Levels 1 (measure participants' reaction to a training) and 2 (measure participants' learning as a result of training) that could be used to evaluate your training.

Level 1

1. _____

_____

2. _____

_____

Level 2

1. _____

_____

2. _____

_____

B. Develop two questions each at Levels 3 (measure participants' change in performance on their job due to training) and 4 (measure whether there has been an impact at large due to training) that could be used to evaluate your training.

Level 3

1. _____

_____

2. _____

_____

Level 4

1. _____

_____

2. _____

_____

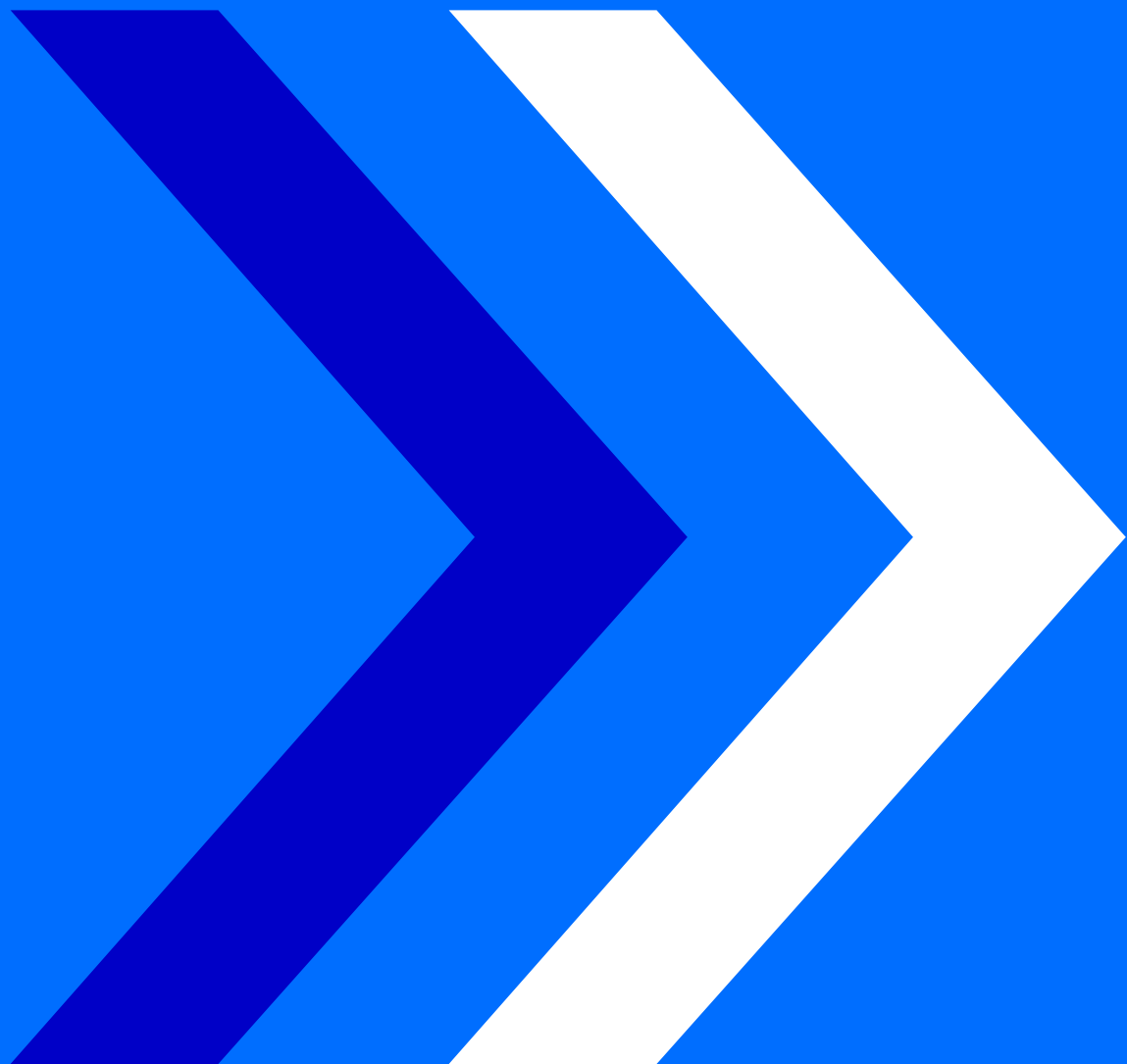**C.** Will these questions help you evaluate the success of your curriculum at the appropriate levels?

_____

_____

_____

Managing and Engaging Participants

01: How to Handle Interrupting Participants

I'm sure you've delivered a training session where you were distracted or interrupted. Maybe someone walked in late, or one person just wouldn't stop chatting. Maybe one person was trying to undermine the session or detract from your message.

There'll be times when you'll need to deal with challenging participants. This means preparing for unexpected questions and interruptions. So, here are ways to prepare for those moments:

First, identify the topic areas you're not comfortable with. You're not expected to be an expert in the content, but participants expect you to know more than them. Audit your knowledge and identify areas that challenge you. Then quiz yourself answering 5 or 6 tough questions.

For example, I often use Excel. But if I were to instruct someone, I'd prepare myself to answer how to do macros since it's something I don't use often.

Also, be aware of how you react to participant questions. You always want to show confidence so try to avoid these common non-verbal cues:

1) First, reacting nervously because you may not have an answer. This reaction shows weakness and undermines your credibility. Say confidently that you don't have the answer but will help them find one.

2) Second, responding arrogantly to show off how well you know the topic. This is the opposite of the first point. It may intimidate participants and prevent others from asking questions.

3) And finally, don't look annoyed. This reaction demeans the participant's question and subtly communicates their concern is insignificant.

No one expects you to be perfect, but they expect you to remain neutral addressing questions; your feelings are irrelevant.

Next, mitigate potential interruptions by meeting, greeting, and targeting participants. Before the session begins, make personal connections with participants. Ask simple questions like, what to you do? And what do they expect to take away from the session? Doing these simple things before you begin identifies the "difficult' participants and will reduce potential interruptions.

The third point is about handling a difficult participant. You can always expect one and hopefully you identified them early on. It's important to recognize which of the following four types you're dealing with.

You may get the questioner. This person insists on asking, and sometimes answering, all the questions. You need to set boundaries early or the other participants will question your ability to maintain control.

You may encounter the interrupter. This person loves to show off their knowledge and will add little value to the discussion. They want attention at the expense of the trainer. Shut them down by calmly explaining you have a lot to cover but you're open to chatting with them after the session.

The third type is the distractor. We've all had one of these...they're always having side conversations and bothering others. Here's what you do. First, move towards that person. Many times, they'll stop because you're in their presence. If that's fails, then stop what you're doing and directly ask if they have a question or something they'd like to share with you or the group.

And finally, there's what all trainers fear, and that's the heckler. This person's sole intent is to cause interruptions and disrupt the session. Fortunately, this doesn't happen often. First, applying the previous points. If those don't work use humor to reduce their power and remain calm. Trust me, they want you to lose it. If they're being confrontational, rephrase their comment in a neutral context before responding. Saying something such as, "What I hear you saying is...". Then, respond confidently and directly to nonverbally communicate say you refuse to be intimidated.

Obviously, dealing with challenging participants and interruptions is frustrating. But realize you control the session and should always do so. Take a professional approach and address the situation when it happens. Your audience will respect you for it.

TIPS: Handle Interrupting Participants

1. Know Your Vulnerabilities

- Anticipate areas that'll challenge them.
- Anticipate the five or six most difficult questions you may face,
- Rehearse how you'll deal with them.

2. Non-Verbal Reactions to Avoid

- Nervously reacting.
- Responding arrogantly.
- Responding annoyingly.

3. Meet, Greet, and Target Participants

- Saying hello informally gets you to make personal connections.
- Meeting and greeting mitigates potential interruptions.
- Identifies those that may prove to be a challenge.

4. Dealing with Difficult Participants

- The questioner.
- The interrupter.
- The distractor.
- The dreaded heckler.

02: Evaluating Learning Performance

Training employees is a costly endeavor. So, it's no surprise stakeholders will expect to see tangible improvement in employee performance. But regretfully, evaluating performance isn't always done properly or even at all.

Training is about helping people make a positive difference in their work. This happens only if you know whether the training you're conducting is effective. For both these reasons you need to find a way to evaluate your efforts.

One common way is to conduct testing. Testing can be an effective method but it's not a complete way to assess employee performance. It's usually about how much someone recalls, not whether they can apply the skills. And testing is often an after-thought making it too late to change anything.

Effective participant performance assessment requires preparing a variety of evaluation methods conducted at different times specifically before, during and after the training activity.

First, clearly identify what aspect of the job participants want to improve. This sounds obvious but it sometimes gets lost during the training. It's something that should be done before the training begins. Your goal is to align the skills, tools, and knowledge employees need to get them to improve job performance.

Next is to match the learning objectives with job requirements. After you know what things participants must do on the job, it's time to correlate them to the learning objectives. In other words, it's about using evaluation tools to determine if employees have met the requirements from the learning objectives.

Now, you need to assess participant performance during and upon completing the training. This is where you need to move past the traditional testing and develop a variety of assessment tools. For example, a learning objective might be "Perform the steps to complete an operational process". You can ask participants to systematically work through the process steps. Or you could present job-specific scenarios and ask them to apply the process to them.

The last step is evaluating the training effort after a period of time. Too often trainers confuse this with an end of course assessment. It's not that. Effective trainers recognize sustained learning only happens when participants demonstrate improved performance over a period of time.

To make this happen support their learning long after the session is complete. Offer refresher sessions, on-the-job coaching, online support, and behavioral rewards. Your objective it to show how their learning helps them to achieve specific performance objectives.

Effective training is about how well participants can apply the skills to improve their work performance. Be sure to identify the skills participants need to improve and then develop and apply a variety of assessment tools during and after the session.

TIPS:

1. Identify needs for the job

- Begins before the actual training session.
- Figure out what employees need to know.
- Focus on skills, tools, or knowledge.

2. Match learning to job requirements

- Align the learning objectives with participant needs.
- Create assessment methods to determine if employees met the learning objectives.

3. Assess performance

- **Assessing performance during and upon completing the training.**
- Develop assessment tools for each learning objective.
- Apply a variety of assessment methods.

4. Evaluate training over time

- Demonstrate performance improvement over time.
- Provide refresher sessions.
- Monitor job performance,
- Achieve specific performance objectives initially set.
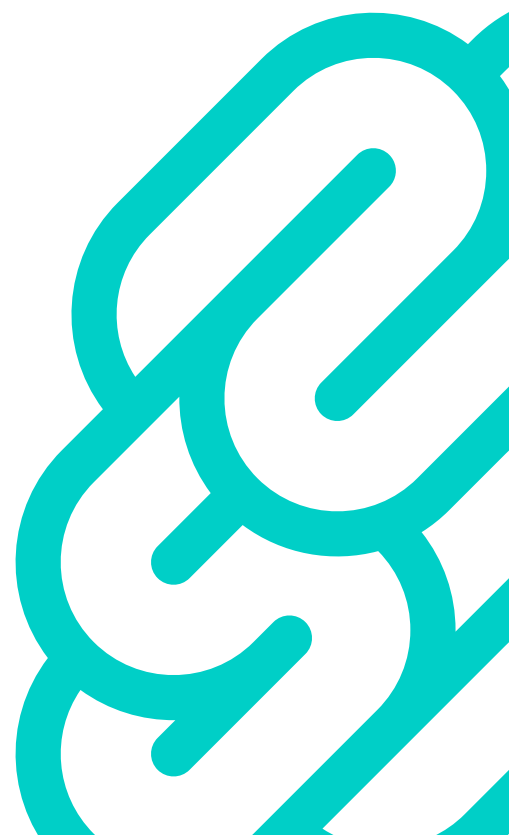
Training Day: Ongoing Evaluation

These methods of formative evaluation are often used during the training delivery phase. The process allows trainers to determine how they need to adapt their training plans and delivery so that a training session or program will be most effective for participants.

Review these ideas and tools to help you assess if your curriculum is ready for a successful delivery, including obtaining feedback from your participants.

- **1. Pre- and Post-Knowledge Test:** Before you begin the content of the training, ask students to complete a knowledge-based questionnaire or verbally ask them a series of questions to determine what they already know about the training topic.

  - Pass out the exact same questionnaire or ask the same questions at the end of the training to gauge how their answers have changed from before the training began.

  - Keep the questions brief

  - Focus questions on the learning objectives. (You want to determine what participants already know and therefore, what you can leave out of the training or spend less and more time on.)

- **2. Trainer Assessment:** During breaks, the trainer(s) should assess the progress of the training. If there is more than one trainer, each trainer should provide honest and helpful feedback to each other.

  - Are students engaged?

  - Was there possible confusion on any portion of the session so far?

  - Is more time needed for a particular portion of the session?

  - Are the trainers going too fast or do they need to pick up the pace?

  - Are participants interacting as a group enough?

- **3. Participant Check-in:** Ask participants briefly how things are going. Find a convenient time to hand out a half-slip of paper and ask four or five questions similar to the following:
  - What have you learned so far in this training session that you didn't know before you walked in?
  - What would you like to know more about that was addressed so far in the session?
  - How is the pace of the session so far? Too Fast   Too Slow   Just Right
  - What did you like best about the morning (or afternoon) session?
  - How can the trainers make the remainder of the session most effective for you as a participant?

- **4. Post-training participant feedback:** If the training will last longer than one day, ask a questions to determine how the first day of training went and how the trainer(s) can make it more effective the second day. All responses should be anonymous.

- **5. Suggested questions:**
  - What has gone well so far in this training?
  - What have you learned that is new?
  - What was presented that you already knew?
  - What would you like to know more about?
  - Tomorrow's training session will focus on _____ and _____. What would you like to know about these topics?
  - What can the trainer(s) do differently to make the training more effective?
  - What can you as participants do to make it more effective?

Adapted from: Levels of evaluation based on Kirkpatrick, D., 1994, *Evaluating Training Programs: The Four Levels*, San Francisco: Berrett-Koehler.
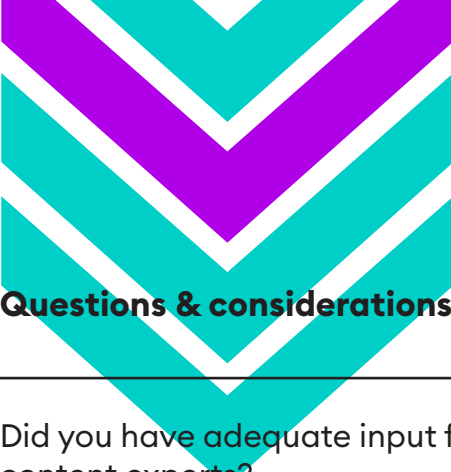
Process Evaluation
Training Development

Process Evaluation (or Formative Evaluation)–occurs while the training is being designed, developed, and delivered. It allows trainers to determine what needs to change in their training plans and delivery so that a training session or program will be most effective for participants.
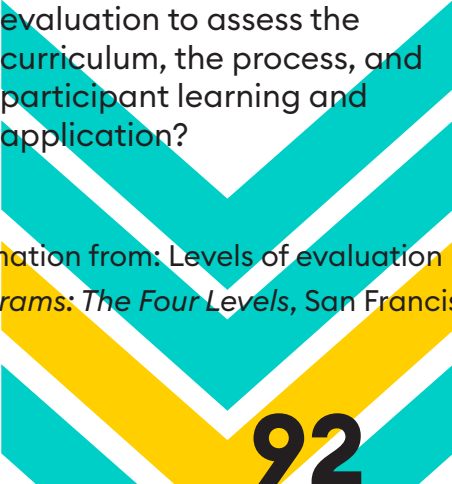
TRAINING DEVELOPMENT

As you develop materials, content experts should be on-hand to conduct reviews and offer suggestions. Once the course is complete, a beta or pilot test is an excellent way to identify problem areas and holes in the curriculum. Like the evaluation of the training design, using content experts, possible trainers, and members of the target population is recommended.

In order to evaluate your progress, check the boxes for the items you have addressed. Use the "Answers and Notes" column for answers and ideas about next steps.
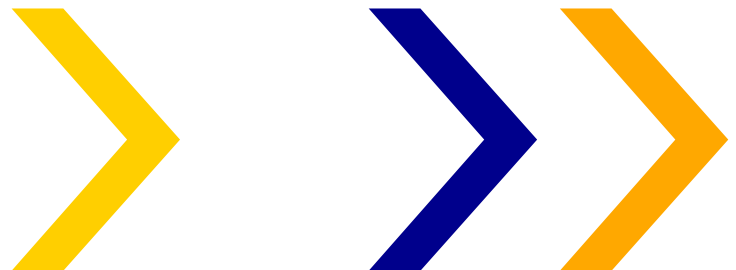
Yes	Needs More Work	Questions & considerations	Notes & Follow up
		Did you have adequate input from content experts?	
		Did you conduct a review and/or pilot training with a good representation of stakeholders?	
		Do you have enough/too much time allotted for each portion of the training?	
		What content areas need more examples, statistics, case studies, etc.?	
		Is there a blend of participant and instructor talk?	
		Is there adequate time given to class discussion, teacher explanation/lecture, question-answer periods, group activity, and individual exercises?	
		What should the trainers work on regarding classroom presence, style, and overall teaching effectiveness?	
		Does the course actually meet the stated learning objectives? Do the learning objectives need to be modified?	
		Have you built in adequate evaluation to assess the curriculum, the process, and participant learning and application?	

03: Providing Feedback

Most feedback I hear trainers offer is something like, "You're doing a good job" or "You're doing it wrong" and then they move on to another participant and repeat the same thing. This is an example of providing low value feedback.

Providing good feedback is difficult. Doing so can make it one of the most effective strategies to encourage improved performance. But when done poorly, it may do more harm than good. And your participants expect you to provide objective and targeted feedback. Here are six items to apply when offering feedback.

First, keep it real. When a struggling participant suddenly does something well, it's tempting to want to go over praise. But doing so may cause an opposite effect. Sometimes over praising comes across as insincere and people will see right through it. Also, praising too often may demotivate the person in other areas.

Second, Correct quietly. No one wants to be the person that doesn't get it. So, always offer to share improvement feedback in confidence and privately. Remember, you promised they could make mistakes so live up to your safe space promise.

Third, Be specific. When you say, 'you're doing a good job' it doesn't mean much. What do you mean by "good"? and what about "job"? It's all very subjective. Be as detailed and specific as possible. Your feedback should be unambiguous and help the participant focus on what they should do more of.

Fourth, provide feedback on the process. Your feedback should always focus on participant effort rather than how smart they are. Doing so focuses their motivation on the skill and helps to instill new behaviors and habits.

Fifth, ask a mix of open and closed questions. Effective trainers will offer feedback applying a combination of open and closed questions. Closed statements convey on key pieces of information and helps to focus the conversation. Open one's help solicit a better understanding of the situation. So, mix it up.

Sixth, state actions to take. Effective feedback can only lead to change if the person knows where they need to improve and what they need to do more of. Clearly state what they should do differently or help them develop a personal improvement plan. The more detailed and specific your actions, the better.

Your role as a trainer is to facilitate and support change, not just to pat people on the back. Work closely with participants to have them leave your session ready to apply their newly acquired skills and knowledge.

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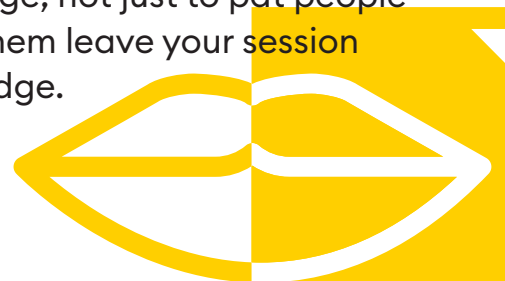
TIPS: Providing Feedback

Rule 1. Don't Go Overboard

- Be sincere
- Don't over praise

Rule 2. Correct Quietly

- Speak to the individual privately
- Limit the attention drawn to the feedback

Rule 3. Be Specific

- Provide detail and be specific with feedback
- Removes ambiguity and reinforces what you want more of
- Use examples when available

Rule 4. Focus on Process

- Praise effort, not intelligence
- One person is not smarter than another

Rule 5. Combine Open and closed questions

- Closed questions limit you to a yes or no answer and don't identify opportunities
- Open questions encourage ownership of the situation.
- Apply open and closed questions to provide feedback

### Rule 6. End with Clear Action Points

- Feedback not leading to a change in behaviour is useless
- Provide detailed and specific the action points

Exercise: Working with Others

This tool provides practical tips to help you improve your 'working with others' skills. Review each of the tips below and practice the ones that are the most relevant to your learning needs.

Working with a Partner or a Team

- Maintain open lines of communication with team members by freely sharing information.
- Exchange contact information with your colleagues and create a team contact list.
- Contribute to group decisions by stating your ideas and points of view.
- Make decisions co-operatively within the team.
- Contribute to the team by completing the tasks assigned to you on time.
- Get acquainted with new team members by introducing yourself and sharing an interesting fact about your job.
- Build a good rapport with your colleagues by participating in group activities (e.g. after work social events).
- Acknowledge and understand your own strengths and weaknesses.
- Acknowledge and use the skill strengths, ideas and opinions of other team members.
- Encourage your team members to share ideas by asking questions and listening attentively.
- Always consider the feedback and advice given by other team members.
- Phrase your suggestions as questions (e.g. instead of saying "I think we should..." say "What about doing...").
- Let your colleagues know when they are doing a good job.
- Respect the feelings, views and values of other team members.
- Support and encourage fellow team members by helping those who need assistance.
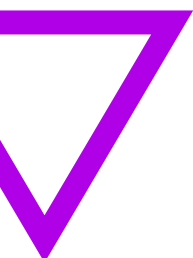- Do not avoid conflict. Address issues or problems when they happen.
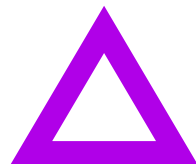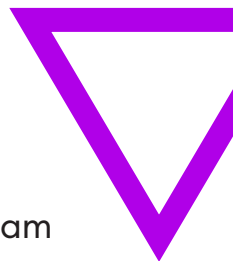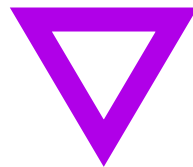
Giving Feedback

Think about a time when you provided feedback on someone else's work. Did you...

- Limit your feedback to 2 or 3 key points?
- Recognize the strengths of the work before addressing areas for improvement?
- Offer specific suggestions for improving the work?
- Take responsibility for your feedback (e.g., begin sentences with "I think" or "In my opinion")?
- Choose an appropriate time and location to deliver the feedback?
- Explain what could be learned from this experience?
- Follow up after the feedback session to demonstrate support and offer additional help?

Use the table below to record what you did well and what you could improve the next time you provide feedback.

What I Did Well	What I could do better next time
e.g. I offered very specific suggestions on how to improve the work.	e.g. I did not choose the best location to deliver the feedback. Next time, I will choose a more private location.

Receiving Feedback

Think about a time when someone gave you feedback on your work. Did you...

- Actively listen to the feedback provided and try to understand the other person's point of view?
- Take notes so that you could review and apply the suggested changes?
- Avoid taking the feedback personally?
- Focus on what could be learned by this experience and how things could be done differently in the future?
- Ask for clarification if/when you did not understand a comment?
- Thank your colleague(s) for taking the time to provide you with feedback?

Use the table below to record what you did well and what you could improve the next time you receive feedback.

What I Did Well	What I could do better next time
e.g. I asked my colleague to explain some of his feedback when I did not understand what he was saying.	e.g. I did not write down all the feedback I was given, and now I forget what changes need to be made. Next time, I will write down all of the suggestions provided to me.

04: Participant Engagement

One of the more challenging and elusive elements trainers face is making tangible connections with participants! But, when the connection happens, the learning just takes off.

Focusing completely on participants and really knowing the content is your first step but, it shouldn't be the only one. It's more than providing individual attention or addressing their learning concerns. Your participants want to be fully involved. So, here are five ways to get them engaged:

First, use the right engagement methods. There are a wide variety of participation techniques you can apply. But for some reason, many trainers stay in their comfort zone using the same ones over and over, for example, like a show of hands or plenary discussions. Get out of your rut! Experiment! When I ask participants to solve a problem, I don't turn to a slide to give them choices to pick. I challenge them with a problem to solve together.

Second, be sure to plan for the engagement activity. Before randomly using a method consider what value you expect participants will get from it. Engagement activities you select must deliver tangible learning outcomes otherwise you're just wasting time. Define your purpose and actually work through the activities yourself to determine possible outcomes. And, prepare for the unexpected responses too.

Third, make it relevant and easy to engage. Start with a question-and-answer activity. Start with questions you know they can answer. Then as you progress, slowly challenge them but always try to keep everyone involved…. remember, no one left behind. Your objective isn't to eliminate people or create competition; you're there to help them enjoy the learning experience and to build a shared identity.

Fourth, give them time to engage. Time is one area that suffers a lot. When trainer's fall behind they always try to catch up reducing learning activity time. While it may keep you on track time wise, it short-changes their learning opportunity. The same when asking questions. Don't expect them to answer immediately, remember, you know the answer but they're still learning. Allow them time to absorb and reflect on the topic. Remember, silence is also a form of engagement.
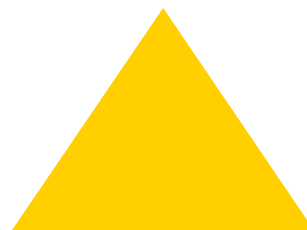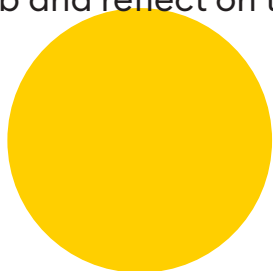
And finally, recognize participant contributions. To get participants involved recognize their involvement. They expect it! They want you to acknowledge their contributions and it motives others to do the same. Be sure to recognize them individually before moving on to the next person or point, even if just saying "Good thought" or "Thank you."

Engagement isn't just an 'in the moment' activity. Note those successful key moments and refer to those past moments during the session. Engaging participants is about individual attention and respect. It fosters deeper learning and trust. In short, it's about making the audience feel competent.

Engaging participants takes time and practice. Don't be afraid to experiment. You may not always be successful, but you'll learn what works well over time. You may be surprised how the simplest of activities will engage your participants.
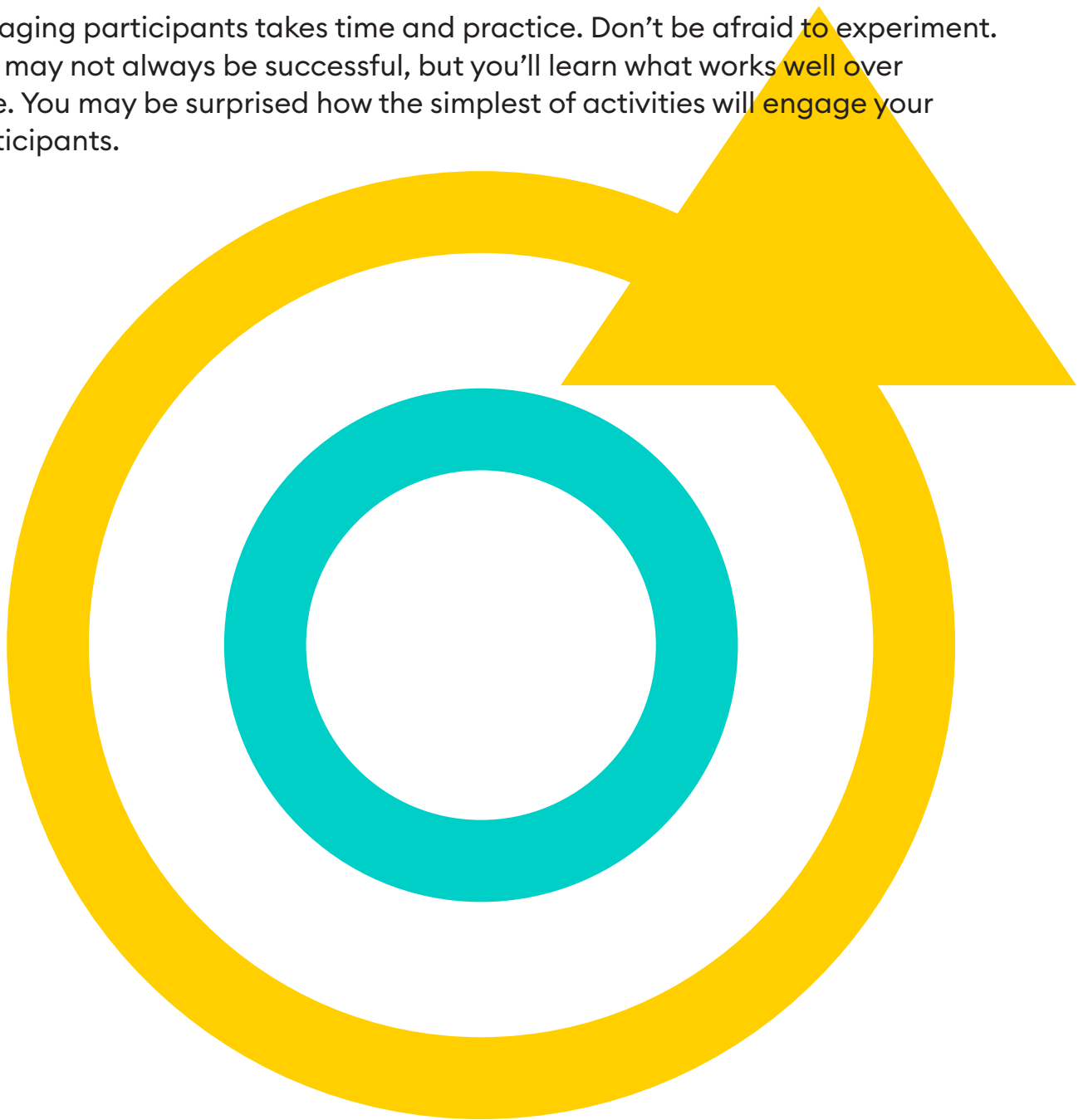
TIPS: Participant Engagement

1. Select Appropriate Engagement Techniques

Some examples include

- Simple show of hands
- Role-playing and games
- Small group exercises
- Polling and contests
- Stick with what you're comfortable with and works.

2. Plan Ahead

- Think about the responses or reactions you might get
- Be clear about your purpose
- Consider how it'll help participant learning
- Consider unexpected responses

3. Get Participants to Relate

- Ask questions so most participant are able to respond.
- Inclusive questions build shared identity

4. Allow Time to Engage

- Give time to absorb what you're saying or asking
- Give time to respond
- Allow time for silence to process your point
- Silence is a form of engagement.

5. Acknowledge Contributions

- People want to be valued and get involved
- Acknowledgement values their contribution and motivates
- Recognize contribution before moving on to the next point

Final Thoughts

Congratulation! You did it! You successfully completed Developing Professional Training and Facilitation Skills.

Learning is more than just taking in knowledge. It's about putting it into practice. So, your next step is the most important one...and that's applying what you learned in this course. If you don't then you're missing a wonderful opportunity to becoming an effective communicator and facilitator.

As you can imagine, this course is only the beginning of your training and facilitation skills development. There's so much more to cover and I hope you'll continue your journey to learn as much as you can.

For further learning, seeking out other relevant resources to grow your skills. Consider training associations and public-speaking groups. And there are many excellent books available too.

And if you'd like to take your training skills to the next level, I've written a book titled, The Trainer's Balanced Scorecard, that will help you to connect learning objectives to operational, performance, and business results. And finally connect with me on LinkedIn, Twitter or visit my website centralknowledge.com, which is a great resource to stay current on training and business resources.

Thank you for joining me and happy training.