Seven Rules for Highly Effective Trainers

A presentation by Robert H. Vaughn, Ph.D. – author of "***The Professional Trainer***"

1. Apply the five stage training model of preparation, presentation, demonstration, application, and maintenance.

- Prepare the trainees, content, yourself, and (where possible) the organization.
- Present the facts, procedures, and concepts.
- Demonstrate the facts, procedures and concepts in ways which them drive home, using either physical demonstrations, examples, case situations, or other techniques.
- Give the trainees an opportunity to apply the facts, procedures or concepts in meaningful ways.
- Provide incentives and support so that trainees will be able to maintain and use the skills and knowledge back on the job. (More on this later)

2. Recognize adult needs in training design and implementation.

- Develop presentations based on androgogy, not pedagogy.
- Use techniques which address various learning style preferences.
- Make the training relevant to their job requirements.
- Speak their language.
- Have the trainees do and create things as part of the training.

3. Teach inductively and deductively and know when to do each.

- Inductive training is characterized by telling (lecture & related methods).
- Deductive training is designed to ask questions which lead learners to an understanding.
- Which topics are appropriate for each?
- Which trainer strengths are tied to each?
- Which takes the most time to prepare / to present / has longest retention?

4. Tie the organization's and individuals' needs to objectives, tie the objectives to the training process, and tie the training to measures of learning.

- First of all, make sure you know what skills and knowledge the organization really needs.
- Then find out what the potential trainees already bring to the party.
- Specify the differences between the two in a clear, measurable form.
- Choose which methods will best support achievement of those objectives.
- Measure whether or not those objectives have been successfully developed in the trainees using valid and reliable techniques.

5. Avoid information overload through appropriate use of stimulus response feedback links and appropriately sequencing and dividing training content.

- Stimulus is anything you tell or show the learner; Response is a check to find out if the learners (a) heard, (b) understood, (c) accepted, and (d) can apply the knowledge or skill; and Feedback is confirmation to the trainees that they've "got" it.
- Questions such as: "Are there any questions?" or "Do you understand?" or "Does anybody here ….?" are not SRF questions; SRF's must relate to the training content.
- Break up the material into SRF links at least every seven or eight minutes.
- Consider appropriate methods for sequencing learning experiences.
- Use distributed learning when you can, rather than concentrated one-shot sessions.

6. Get a high level of participation from all trainees.

- Use non-threatening questioning techniques.
- Use groups of two, three or more.
- Have people all answer simple questions, or write answers down so you can check them, or ask for a show of hands on different issues.
- Manage group discussions effectively.

7. Develop organizational relationships which will support effective transfer of training.

- Strive to be part of the organization's problem solving group, rather than someone who is called to just implement the training.
- Work with supervisors to determine needs and insure relevance of the training by such means as developing training contracts, providing preview sessions for managers, etc.
- Visit the workplace frequently before and after training to verify such things as the equipment and conditions to which the trainees will be returning.
- Develop (or have the trainees develop as part of the training) take-aways which they can use back on the job such as checklists, handouts, forms, small tools, and other aids.
- Use other techniques to encourage application such as secret shopper programs or contests to reward application of training on the job, newsletters, alumni groups, etc.

Dr. Robert H. Vaughn, author of ***The Professional Trainer,*** has personally worked with more than 2,500 people over the years to help develop their training skills. He's created training programs and materials used by such diverse organizations as The U.S. Air Force's Air Training Command and The American Management Associations, among others. As a consultant for divisions of several large organizations, a speaker at local, regional and national conferences, and a faculty member at several different colleges, Dr. Vaughn knows the world of business and the business of training. Both his masters' thesis and doctoral dissertation related to training in business. He has conducted training programs for nearly 100 different corporations and professional associations, mostly focusing on writing, supervision, and training skills.

Dr. Vaughn is a three-time president and twelve year board member of the 400 member Greater Cleveland Chapter of ASTD (formerly the American Society for Training and Development), and received the 2002 Distinguished Faculty Service Award from Lakeland Community College in Ohio where he is a Professor of Management and former Dean of Business. He earned Beta Gamma Sigma recognition in his doctoral work, and is listed in Who's Who in Business and Industry.

Typical Major Differences Between Teaching College and Providing Organizational Training

Consideration	*College Teaching*	*Organizational Training*
Trainer credentials	Academic – often only academic. Some colleges, especially two-year & teaching schools, will also consider work experience and skills in interpersonal communications.	Skill or knowledge in relevant subject regardless of academic achievement; also skill in interpersonal communications will be more critical.
Course content	Usually broad & theoretical. Certain fields such as computers may also have practical element.	Focused & application oriented. Deals mostly with facts & procedures; only rarely with concepts.
Objective levels (using "training" categories)	Normally knowledge based (level 2); occasionally skill based (level 3). Job performance (level 4) is usually only peripheral issue.	While they often include levels 2 & 3, Job performance (level 4) is the outcome of most concern.
Time basis	Usually lock step & tied to a semester or quarter system.	Typically short-term; more self-paced; new groups start as needed.
Grading system	"A" through "F".	Usually pass-fail; many programs not graded at all. Some are proficiency-based.
Common Presentation Style	Lecture & other inductive forms, though cases and lab applications are becoming more common.	Often uses more participative experiences in training; hands on (especially in OJT).
Student unit	Individual; working together is probably considered cheating. "Client" is individual student.	Group learning is much more common. "Client" is the organization in which the trainee works.
Training materials	Comprehensive textbooks & outside research materials.	Company materials & trainer-designed materials. Only rarely are books used.

The five stage Learning Model

Preparation	Presentation (Tell)	Demonstration (Show)	Application (Do)	Maintenance
Prepare the: – Content & materials – Trainer (Yourself) – Trainees – And the organization, where possible	Present the appropriate: – Facts – Procedures – Concepts in ways which effectively drive them home to the trainees.	Show how the facts, procedures or concepts are relevant to trainees – Physical demonstrations – Examples – Case situations – Other techniques	Give people a chance to try out the facts, procedures or concepts – Hands on for skills – Simulations – Role plays – Etc.	Provide incentives and support so trainees will be able to maintain and use the skills and knowledge back on the job.
How will you do this for your training program?				

Differences Between Child and Adult Learning

Characteristics	***Child***	***Adult***
Method of Operating in general	• Dependent and varied with few common experiences. • Don't know their own needs. • Have trouble relating learning to real world. • Often unable to understand relevance due to limited experiences. • Often willing to try and fail.	• Independent, yet with many common experiences. • Capable of Self-Direction. High need for relevance. Will ask: "What's in it for me?" and expect a good answer. • Seek out training to cope with life change events. • More accurate; avoid trial and error.
Method of operating during training	• High dependence on trainer. • Child to parent relationship. • Trainer develops curriculum. • Learn mostly for future use.	• Learners can learn from each other as well as trainer. • Adult to adult relationship. • Learners may help define their needs. • Learn for immediate needs as well as future use. • May need time to unlearn ideas.
Implications for the trainer	• Expert - giver of information. • Need to provide simple, common illustrations. • Must give frequent examples to learners. • Hard to find common denominators to build on. • "Survey" courses work well.	• Catalyst - arranger of training experiences. Also mediator, facilitator, processor and occasionally expert. • Can and should draw on the learner's prior experience and use their examples to illustrate points. • Instructor can use analogies, similes, etc. • Avoid survey courses; focus on specific problems and issues.

A couple of the many adult learning style models

VAK (Visual, auditory & kinesthetic)

Adults may be visual, auditory or kinesthetic learners (or combinations)

Visual is the most common first preference. We learn most of what we know visually. Make training visual by using enhancements to lectures such as handouts, readings, videos, overhead slides, computer projections, models, demonstrations, writing key words on the whiteboard or a flip chart, etc.

Auditory learners do learn by listening rather than (or most likely in addition to) visual or kinesthetic. Clearly organize your thoughts and carefully describe and exemplify the facts, procedures and concepts in a clear and loud enough voice to be heard and understood. Expect and allow time for questions and expansion of ideas. Techniques include lecture, enhanced lecture, discussion, etc

Kinesthetic learners need to be active in order to assimilate information. Give them exercises and experiments to try out and apply the concepts. Let them move about the room. Encourage them to actively take notes. Allow them some freedom to play with props, etc. Techniques include any from the experiential category, such as field trips, exercises, puzzles and games, in-baskets, role plays, etc.

Kolb's model

Adults may learn best by abstract conceptualization, active experimentation, reflective observation, or concrete experiences

Persons with a strong conceptualization mode rely heavily on logical thinking and rational evaluation. They learn best in authority directed, impersonal learning situations. They don't do well with a lack of structure.

Persons with a strong experimentation mode rely heavily on doing things to learn. They like projects, experiments, exercises & group discussion. They dislike passive learning such as lectures.

Persons with a strong experiential mode learn best when they get specific examples in which they can become involved and rely on feeling based judgments. They work with peers, rather than authority.

Persons with a strong reflection mode rely on careful observation and making impartial judgments based on lectures and other inputs. They learn well independently.

Kolb's model actually combines these categories into Accomodators (High active learners requiring specific information), Convergers (High active learners who can deal more conceptually), Divergers (High reflectives who want concrete information), and Assimilators (Highly reflective learners who can deal with abstractions).

Deductive vs. Inductive Training

Variable	*Use Inductive when*	*Use Deductive when*
Trainees' entering behavior (level of knowledge or skill)		
Nature of subject		
Trainer's ability		
Time limitations • **Preparation** • **Delivery** • **Retention**		

Objectives used in Training

Training Model of Objective Levels	Example: *Upon completion of the training, the trainee will*	Example Measurement	Bloom's Taxonomy Equivalent
(1) Attitude or Awareness	Be aware of the company's organization structure, products and major competitors in the industry.	**Student surveys – also called "Smile sheets":** "As a result of training, are you aware of the company's organization structure? ( ) Yes ( ) No"	**Cognitive:** Knowledge **Affective:** Receiving **Psychomotor:** No
(2) Knowledge	Be able to list the six steps in completing a Form 2101.	**Written or oral testing:** "List the six steps required to complete a Form 2101."	**Cognitive:** Comprehension, Application, Analysis; **Affective:** Responding **Psychomotor:** No
(3) Skill ✓ **Cognitive** ✓ **Psychomotor**	Be able to compute the correct interest rate for an application. Given a standard tool kit, be able to remove and replace the hard drive in a PC.	**Performance tests:** "Given five different credit applications, compute the interest rate to be charged with 100% accuracy." **Or:** "On the table you will find a PC, a standard tool kit, and a new hard drive. Remove the old hard drive and replace it with the new one so the computer boots and operates correctly. You will have 25 minutes."	**Cognitive:** Application, Analysis, Synthesis, Evaluation; **Affective:** Organization; **Psychomotor:** No **Cognitive:** Application, Analysis, Synthesis, Evaluation; **Affective:** Organization; Characterization **Psychomotor:** Yes
(4) Job Performance	Complete at least ten sales calls per week and close at least 30% of sales with a minimum of $5000.	***Company records & data external to training:*** Weekly sales report from accounts receivable office which reflect the standards established.	**Cognitive:** Application, Analysis, Synthesis, Evaluation; **Affective:** Valuing, Organization & Characterization; **Psychomotor:** Depends on job

Reasons for Breaking the Class into Sub-Groups

1. Learning (retention) is better because learners are responding actively. That is, the instructor is breaking the big S into small S-R-F links. [Stimulus-Response-Feedback]
2. The instructor gets more feedback. Responses are coming from all participants, and the instructor can circulate and collect a broad sample of responses.
3. Learning is accelerated. Reaching consensus with 3-5 persons is quicker than with 15-20. Participants are thinking more quickly.
4. Learners can discover and work things out for themselves. The emphasis is on deductive, not inductive learning.
5. Interaction increases synergism. There is better thinking when participants discuss their ideas with one another; ideas beget ideas.
6. Emphasis is on adult-to-adult learning (androgogy), rather than parent-to-child learning (pedagogy); we thus avoid dependency on the teacher.
7. Sub-groups help to vary the pace, break up a lecture, and increase the level of activity and interest (e.g., as a "pick-me-up" in the mid-afternoon slump).
8. The instructor can pair up experienced and inexperienced participants. With the better students helping the poorer ones, everyone learns more.
9. A short sub-group assignment can give the instructor some free time ... to make a phone call, study the lesson plan, see why the coffee hasn't arrived, etc.
10. If there are some participants who are not responding, the instructor can listen in to their sub-group and get feedback to see if they're "with it."
11. One purpose of many workshops is teambuilding (networking). By working in different sub-groups, participants get to know one another better.

Techniques for Getting Responses from Every Participant

People learn not by being told, but by experiencing the consequences of their actions. Putting it another way, it's the learners' response and not just the instructor's stimulus that determines how successful the learning will be. But how can an instructor get the entire group to respond? Unfortunately, most instructors don't even try … they call on one person at a time (usually the quicker learners or someone who volunteers), thereby depriving the others of an opportunity to respond at their own rate.

1. When posing a question, pause 10 seconds before selecting a respondent. Look around the group and restate the question. Give everyone time to formulate a response in their heads, then select a respondent.
2. Some questions can be answered by everyone, especially short answer ones.
3. Have the participants write the answer on their notepads. You can circulate and read some of the answers before deciding whom to call on.
4. From time to time, ask your participants to take a guess on something you're about to give them (e.g., what amount of time does the average manager spend communicating on the job?).
5. Distribute handouts that contain the question and space for the answer. After each major teaching point (say, five minutes on the average), have them respond to the next question. Then give them feedback before proceeding.
6. Ask for a show of hands. This is especially useful when you want to polarize a group on a dichotomous issue. For example, "How many of you think the average worker is mainly interested in money? How many disagree?"
7. Have participants respond to their neighbor, working in groups of 2 or 3. For example, "Turn to your neighbor and tell one another what percentage of your time you think is beyond your control."
8. Allow time for silent decision or reflection on questions that don't require an overt response because you know that participants will answer it to themselves. For example, "When did you last send a note commending one of your workers for a job well done?"

Source: Edited from notes by Scott Parry, PhD. Scott is the recently retired president of Training House, Inc., a Princeton, N.J., educational consulting group, and a past national president and a frequent presenter at ASTD (formerly the American Society for Training and Development) national conferences.

Transfer of training …

- *.. means that the trainees want to and are able to use on the job what they learn during training.*
- *If training doesn't transfer, it is wasted time and money.*

Things to consider to improve transfer of training:

Training design

- Schedule training in extended blocks rather than intensively, when possible
- Assign practice or homework to try out on the job between meetings
- Make sure the content is relevant and useable as soon as possible after training
- Build in tools trainees can take with them
- Use an androgogical style

Work with management

- Develop and maintain a high awareness of training among managers
- Use a steering committee to develop and prioritize training needs
- Offer managers chances for input to and participation in training programs
- Measure training costs and benefits in terms management understands and accepts

Work with trainees

- Motivate employees to apply the training
- Secret shopper programs, contests, etc.
- Train people in natural work groups, or …
- Train more than one person from each area
- Keep people connected after the training so they can reinforce each other