Train The Trainer Handout

Contents

Training Needs Analysis Methods

By Louise Tamblin

Key Learning Points

- Training needs analysis (TNA) is one stage of the training problem-solving cycle.
- TNA involves analysing the gap between 'current' and `required' skills.
- There are different ways to conduct a TNA.
- You should select the approach(es) that best fit your objectives and your resources.

The Benefits of Training

Is there any organisation that doesn't want a skilled and competent workforce? This appears to be a fundamental desire of most organisations, and training is perceived as one way to achieve this. Staff training has been claimed to achieve the following:

- Raise skill levels among the workforce.
- Develop more efficient workers.
- Put the organisation ahead of the competition.
- Demonstrate to employees that they are valued.
- Comply with mandatory training requirements.
- Keep staff up to date with industry or sector change.
- Help staff adapt to internal change.

The importance of analysing training needs

Despite such claims, many organisations do not formally identify their training needs and have no training strategy. In these situations trainers have traditionally focused on the quality of delivery. Yet excellent training delivery may not produce a skilled and competent workforce - unsuitable courses targeted at inappropriate people are unlikely to achieve positive outcomes.

Without a TNA, training provision can closely resemble a lottery, in which prizes are awarded to either the most vocal employees or else restricted to a list of seemingly arbitrarily selected courses.

We need to move towards a model in which training is always planned and targeted. One way to achieve this is by viewing the training process as a specific example of a problem-solving cycle (see Figure 1). By working through each stage in turn we are more likely to meet learning needs.

The problem-solving cycle always involves a gap analysis-the difference between where you are now and where you want to be. In a TNA your aim is to understand the current situation, describe the required situation, identify the gap between these two and then plan how the gap can best be closed.

If there are key competencies and if valid and reliable data collection tools exist, then the gap analysis may be a relatively straightforward process. If skill levels need defining and working practices need analysing then the gap analysis becomes more complex.

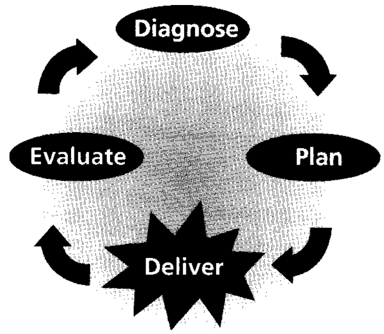


Fig. 1: Problem-solving cycle

Watch out!

Large-scale TNA surveys are often highly visible and require investment of time and money, so the cost of making mistakes can be high. Be careful to get people engaged, particularly if you want the survey to become part of an annual benchmarking exercise. Be sure to do the following:

- Explain the purpose of the TNA carefully.
- Explain how you intend to use the information gained.
- Try to set realistic expectations around the survey outcomes.
- Focus on needs and avoid asking for hypothetical wish-lists that cannot be actioned.
- Keep the questionnaire grounded in reality - it is easy for people to become cynical.
- Don't let the survey fall into a black hole - disseminate the main findings and your planned actions.
- Thank everyone for taking part.

Remember

Since there are often alternative ways of undertaking even a relatively simple TNA, try not to get obsessed with designing the perfect TNA. Instead, keep your objectives at the front of your mind and check that your chosen approach will meet them. Continually ask yourself the questions shown below:-

- What an I trying to achieve?
- What is the best way to collect the information?
- What practical considerations do I need to consider?

Looking ahead

Remember that a TNA is part of a problem-solving process and that you must assess whether your training initiatives have dosed the gap between current and required states. The required position must be precisely defined in order to gauge the success of your training.
Using a TNA questionnaire is one way of obtaining benchmark data that can be compared with data from subsequent surveys. You can also use internal data to measure the impact of training initiatives. While internal data alone may not be adequate - for example there may be many factors that affect sales, not just sales skills-they can be one important measurement.

By using multiple measurements you are able to build up a more complete picture of the impact of your training initiatives.

Top tip
Remember that even when skill gaps have been identified, training may not be the appropriate way forward. For example, skill shortages can sometimes be addressed through internal moves or apparent gaps may stem from company procedures rather than a genuine skill shortage. Once training needs have been identified, do think creatively about your training recommendations. Be prepared to consider the following:-

- Classroom-based courses.
- NVQ.
- Distance learning.
- e-learning.
- Mentoring.
- Recommending reading.
- Mixed modes.

A good TNA survey will shed light on the scale and urgency of training needs. Think about the return on investment that training is likely to produce and how to maximise this. What is the return on the different training alternatives? Can the company afford to improve? Can it afford not to?

Expert Advice
Remember that a TNA should focus on current and required situations and aim to explore training needs rather than *wants or desires*.

Designing a TNA
Although questionnaires are probably the most widely used technique, TNA can be approached in a range of ways (see Figure 2). These are briefly considered below.

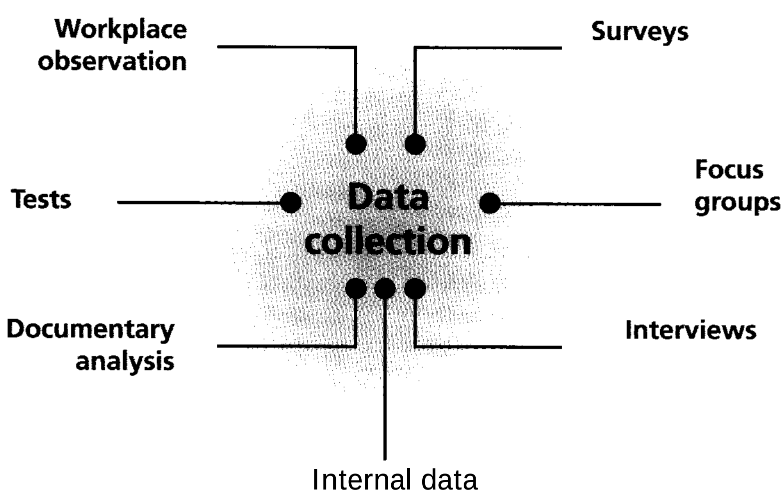


Fig. 2: Different methods of analysing training needs

Interviews

Face-to-face interviews allow you to explore topics in depth, probe answers and follow up new information. Such interviews are usually 'semi-structured', so although you cover key areas, there is no formal list of questions. Face-to-face interviews are often used in individual TNA.

Both face-to-face and telephone interviews are also useful when you need more background information about an area. Imagine that customer complaints have risen and you are wondering if the call centre staff require more training. In-depth interviews will help you explore the reasons for the complaints, current working practices and skill gaps. You can also involve all the stakeholders to ensure that you have a 360-degree picture.

However, interviews are time consuming to undertake and to analyse. You also need to consider who conducts the interviews, their relationship with the interviewee and their level of interview expertise.

Focus groups

Focus groups are also useful when an in-depth exploration of an area is needed. Focus groups typically involve 8-10 fairly homogenous people (e.g. with similar roles) and last for around two hours. Information from focus groups can be used as the starting point for a well-designed wide-scale TNA survey.

Once again, you need to consider where and when the groups will be held, the mix of people attending and the identity of the facilitator.

Organisational data

Relevant internal organisational data are often easily and quickly available. Many companies collect data on sales figures, customer complaints, productivity, call-centre call rates and so on. The value of such data is that they provide an objective 'top line' picture.
However, it is easy to assume wrongly that performance deteriorations indicate training needs when this may not be the case.

Documentary analysis

Analysing appropriate internal and external documents can also help to identify training needs and required skill levels. Key competencies or a job description may be used to identify individual training needs. External documents or guidelines can identify areas that require, for example, mandatory training - such as health and safety issues.

Workplace observation

The value of workplace observation is that it captures the real picture. Compared with other data collection techniques, observation is expensive and time consuming and it is important that the observer remains in the field long enough to have observed 'normal' activity. Again, the observer should be experienced and ideally a subject-matter expert.

Tests

Tests are sometimes used in TNA. Multiple-choice tests are often quick and easy to administer. However, the results are only as good as your test, and test development requires expertise.

Questionnaires

Questionnaires are probably the most widely used method of conducting TNA. As with all approaches, they offer both benefits and limitations.

Benefits

Questionnaires are ideal when the TNA involves a large number of people.
Questionnaires can be sent to all members of an organisation and in some modes of delivery - for example e-mail - increasing the sample size does not substantially increase your costs.

Questionnaires can be administered in a number of ways
You can administer your questionnaires via e-mail, Internet, post (internal or external) or telephone.

Questionnaires help to assess the scale of the issue
Because you can survey large numbers, you can accurately assess the scale of an issue. Unlike an in-depth interview, where the aim is to explore and understand a topic, your questionnaires will show how many people are affected and allow quantification.

Questionnaires enable comparisons
In addition to assessing scale, a TNA survey allows you to compare sub-groups within your workforce. Is there a sub-group that is most in need of training?

Questionnaires can help you to prioritise among competing training needs
A large-scale issue may not necessarily be a priority area. A well-designed survey can help you to prioritise training needs.

Questionnaires can help you to draw up an organisational training profile
You can then use the training profile to help plan your training strategy.

Ease of analysis
Questionnaire data are generally easy to analyse, particularly if the questionnaires were delivered on-line

Limitations

Less useful for exploratory use
Questionnaires are best designed with predominantly dosed questions - if your aim is to explore issues then you should consider interviews or focus groups.

There are many poorly designed questionnaires
The information you obtain from your survey is dependent on the quality of the questionnaire. It is easy to overlook the skill involved in good questionnaire design.

Questionnaire fatigue
You need to remember that if people are over-surveyed, or if they do not see any benefits for themselves, they may be unwilling to participate in the future. A low response rate will make it more difficult for you to assess needs accurately.

Choosing the best methodology

The approach that you choose for a TNA may be influenced by a number of factors, including the following:-

- The precise aims and objectives of the TNA.
- The strategic importance of the TNA.
- The scope or breadth of the TNA - what topics do you want to cover?
- Whether it is an individual, team or organisational TNA - what level of analysis do you need?
- The amount of background information you already have.
- The resources you have available-time, budget and manpower.
- Managerial pressure or support.
- The accuracy of the information required.

Combining methodologies

Many TNA's use a combination of approaches, as shown in Figure 3.
Other approaches could also be used - you need to decide on the best and most pragmatic option to meet your objectives.

What training needs does Joe Smith have in his role of payroll administrator?	What are the greatest training needs among staff in the customer care department?	What IT training needs do we have within our organisation?
Individual TNA • Individual interview • Analysis of job description or competencies • Feedback from manager and peers (360 degree)	Departmental TNA • Focus groups with departmental members • Departmental performance indicators • Customer feedback	Organisational TNA • Analysis of IT competencies required • Company-wide survey addressing IT skills

Fig. 3: Combined approaches to TNA

Instructional Design - An Overview

By David Skinner

Key learning points

- Make sure that training is the answer to the problem - not all problems can be solved by training.
- Consult a11 the stakeholders who are likely to be affected by your training course.
- Ask the right questions before you start to design the training.
- Make the training clearly relevant to the business objectives - take care to state the outcomes, aim and objectives of the training clearly.

The Importance of Design

Many books about training concentrate on training content, delivery and methods - few of them include much on training design. Here is an overview of the points to consider when designing a training programme.

The design of training is the most important aspect of preparing a training course or workshop. It is the second element of the well-known training cycle (Figure 1), and usually follows from a clear knowledge of the training needs, obtained by one or more of the many techniques for Training Needs Analysis (TNA). Before starting the design process, you need to be clear about whether training is likely to be the answer to the problem.

What is Instructional design?

The term 'instructional design' could be taken to imply that the training course or workshop has a rigid, formal structure. That was often the case in the past, and it may still apply when the content is clearly defined and unvarying. Such courses are usually of a technical nature, and are often accredited by external bodies: for example, a course to teach an IT software application, such as Microsoft Word or Excel. The content is standard; whoever delivers the course, so it has to be defined clearly and in detail in the form of an Instructional specification or a Training plan.

Many current training interventions are much less clearly defined. Many trainers use facilitation techniques which, in their purest form, allow the learners to design and plan their own content and the way in which they learn it. However, even in those cases the trainer or facilitator needs some sort of overall plan for the desirable outcomes and the best ways of achieving them - in other words, an agenda. And the only way to obtain that is to undertake some design activity, however informal.

I want to use the term 'instructional design' to encompass all activity of this kind: across the spectrum from a rigid, detailed plan to a bare outline on the back of an envelope.

We are assuming that the findings from the needs analysis suggest that training can bridge the performance gap. Training can only bridge a gap in knowledge or skill. If the problem is caused by anything other than knowledge or skill deficiency - for example lack of motivation, lack of resources, lack of support, unreasonable expectations and so on - then something other than training is required.

Designing training - step by step

These seven steps cover the training design process you will need to go through from the initial idea through to evaluation and review.

1. The initial idea - from an internal problem or open course proposal.
2. Identify client needs - usually by carrying out a TNA.
3. Link training to business objectives - essential to ensure management buy-in and to keep the training real.
4. Design the learning solution - covers training strategy and methods.
5. Produce materials - detailed design of content, handouts, training aids, workbooks etc.
6. Pilot the solution - run an exploratory course to test the feasibility and discover any problems, then feed back into the course design process.
7. Evaluate and review - discover the value of the training and feed back the lessons learned.

Who are the stakeholders?

The stakeholders - people affected by the training - all need to be considered and their buy-in obtained. Top-down commitment is important (this a major factor in investors in People). The stakeholders include the following.

- **Client MD/CEO** - if they do not support the training fully, it is unlikely to be successful.
- **Sponsor** - often the MD/CEO in a small company or a senior manager in a larger one; the 'training champion' whose backing you need to ensure that the training is related to the business objectives.
- **Line managers** - they should be fully aware of why the training is being held and why it will benefit their staff; too often they simply 'send' delegates to the training, without either manager or delegate really knowing why.
- **Training manager** - often, but not always, the instigator of the training, and sometimes the designer and deliverer as well; can sometimes, unwittingly, prevent an external provider getting access to higher management in the organisation.
- **Subject-matter experts** - they might be needed to advise on content, especially if the training is highly technical or specialist.
- **Internal trainer or external training provider** - the person delivering the training; ideally they should also be closely involved in the design stage.
- **Learners** - they need to know why they are there, what they intend to gain from the training, and why their line manager considers the training important enough to release them to attend.

A few comments we hear from management

'I managed without any training, so my people can as well.'
'My people have already had some training this year.'
'If they go on a training course, they'll be after my job.'
'They get induction training when they join, and that's enough.'
'My boss doesn't believe in training, so neither do I'

The Design Process

Outcomes, Aims and Objectives

The starting point for the design process is the outcomes of the training. Outcomes state what will be different after the training. When agreed, they are usually converted into an overall aim in the form: '*The aim of this workshop is to ...*'; with supporting training objectives, often in the form: '*By the end of this workshop, you will be able to ...'.*

The clearer the aim and objectives, the better you will be able to carry out the actual design of the course or workshop.

Other things to consider include: stakeholders, business objectives, management buy-in, learners, content, training strategy, methods, resources, piloting, evaluation and review.

Business Objectives

To be successful, training should be closely linked to the objectives of the business. This is why it is important to consult operational managers and to obtain management buy-in.

Management Buy-in

Top or senior management need to endorse the training - 'top-down commitment' - to ensure its success. Everyone involved in the process, especially the learner, needs to be aware of this commitment, to know: 'We are doing this because the boss wants us to.' Without this, the training can be left in limbo, with no apparent link to what the learners do back at work.

Learners

Things to consider about the learners include: their previous level of knowledge of the subject (beginner, competent, expert etc.); whether there is a range of levels; whether they already know each other; and, preferably, their individual learning styles.

Content

Content is linked to outcomes. The difference between what the learners know, or can do, now and their desired level of knowledge or skill after the training is called the performance gap - the content has to be designed to bridge that gap.

Training Strategy

Basically, this means the overall training format. Will it be a one-day workshop, a week-long course, a short seminar, on-the-job instruction, self-study from a manual, e-learning, coaching and so on?

Methods

Once you have decided on the strategy, consider the methods. Should you use presentations, demonstrations, experiential learning, informal facilitation, practical exercises and so on? Do you need a mixture of methods? What (if anything) has been used on similar courses before?

Resources

What is available? This includes the training venue, materials, actual work equipment, trainers, time and, most importantly, budget - don't forget to include the opportunity costs of having the learners away from the workplace to be trained, and any travel and accommodation costs.

Piloting

If the training course is one of a series, or if there are many learners to be trained, it is good practice to carry out a pilot course; using a representative sample of learners. The pilot course is then subjected to a process of evaluation and review.

Evaluation and review

Training evaluation is a much 'neglected activity. It involves an awareness of how effective the training has been, what difference it has made back at the workplace and whether it has added value - preferably calculated as a return on investment (ROI). The review process might lead to a redesign'; of parts of the course before it' is run again. The evaluation methods should be built into the course design.

Top tips for gaining management buy-in'

- Make sure the person who makes the decisions supports the project. Involve the CEO.
- Anchor the needs assessment and training to the company's strategic plan.
- Prove the value of investing in training – if possible, the cash value.
- Set clear goals and expectations, then deliver what you promise.
- Design training to meet 'perceived' needs as well as real needs.
- Share reports with everyone. People like to feel 'in' on things.
- Evaluate results. Adjust, edit, redesign if necessary. Be accountable. Ensure transfer.
- Form an inside board (steering/advisory committee).
- Prioritise for importance and check for relevance.
- Publicise your own success.
- Get testimonials from influential people.

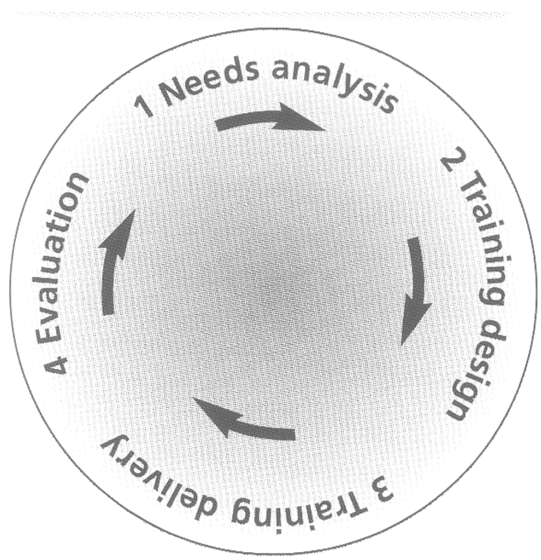


Fig. 1 The training cycle

Training design is the second element of the training cycle and usually follows from a clear knowledge of the training needs

Thirty questions to ask before designing your next workshop

Here are 30 common questions, divided into functional areas, that you need to ask and have answered before you accept your next training design project!

Management

1 How can we get management buy-in for this training (the most vital question)?
2 Who is the sponsor of this project?

TNA

3 How was the training need determined?
4 What is the performance gap?

Learners

5 Who are the learners?
6 How many learners will need to be part of this training event?
7 How many learners will take part in each workshop?

Training solution

8 When is the deadline for the workshop design to be completed?
9 Who will have input into the workshop design and content?
10 How much content is anticipated?
11 Have any of the learning methods/media etc. already been decided?

Trainers / Facilitators

12 Are the subject experts going to be involved or available for subject advice? If so, who are they and where are they?
13 Are facilitators available?
14 Are the facilitators subject matter experts?
15 Will it be necessary to train facilitators in the subject matter?

Venue

16 Where will the training take place (in-house, in an external training facility, on the job)?
17 What is the size of the training room?

Delivery

18 Will a pilot workshop take place?
19 Will actual work equipment be available for training purposes?
20 Have similar workshops been run in the past?

Resources and materials

21 Are there some existing course materials that can be reused?
22 Have any course materials already been created?
23 Will job aids be acceptable (roadmaps, tick lists, 'how-to' sheets etc.)?
24 Can outside resources be used?
25 How will user and workshop materials be produced?
26 Has a budget been set for design?
27 Will the learners complete any pre- and post-training work?

Evaluation

28 How will the workshop be evaluated?
29 What measures will be in place to evaluate the success of the training?
30 Who will be responsible for evaluating the success of the training?

How to prepare and use PowerPoint

By Stella Collins

Key learning points

- PowerPoint can be used in many creative ways - not just presentations.
- Ask yourself Who?, What?, Why?, How?, Where? and When? before you start.
- Experiment and enjoy finding out what features you can use.
- Observe everyday life to see what makes a good presentation.
- It's a tool – not the message
- Practise before you run your presentation/course.

PowerPoint is many things to many people. To some the thought of sitting through another session of 'Death by PowerPoint' is a horror worse than having to give a presentation in the first place. To others it's the saviour that will stop them from having to be the centre of attention. What are your feelings about it?
As trainers some of us love to use it and some of us hate it, and you may have decided already not to read this module as you just don't use it. Or you may have always wanted to use it but the technology worries you. The principles of accelerated learning show us how important it is to appeal to multiple intelligences, learning styles and so on. Visual aids make a huge impact on presentations, and PowerPoint can be a great way of providing them - it's the way you use it that matters.

For many of us PowerPoint has become the ubiquitous tool of management presentations and training courses. But are there other things you can do with it? Don your creative hat and ask the question 'What else can I do with PowerPoint?'

If you're using it for a presentation do you use it because that's what everyone else does, or have you considered other options and decided that PowerPoint is the best tool currently available for this particular job? It is a very powerful tool and when used appropriately can be stimulating, engaging and entertaining-for you and your audience.

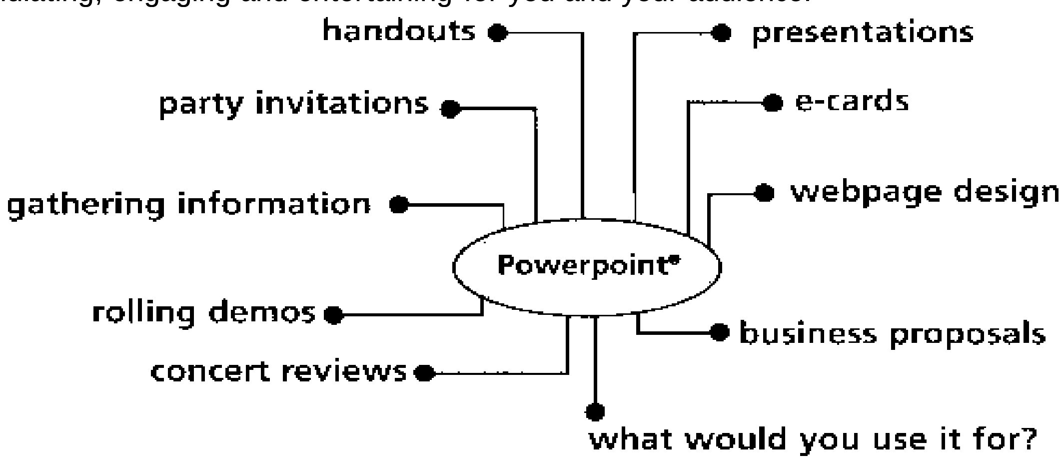


Fig. 1 : What else can I do with PowerPoint?

There are some important questions to ask yourself before you fire up PowerPoint and dive straight into creating a presentation:

- What am I trying to communicate?
- Who am I communicating with?
- Why am I communicating with them?
- How could I add impact to my message?
- Where am I in this interaction? - you are the most important part of any presentation.

What if it goes wrong?

For anyone having to deal with technology there is always the fear: What if ...

- the laptop breaks;
- the projector dies; or
- they just won't talk to each other?

Don't worry - your PowerPoint presentation is only a tool in your armoury. You are the main feature. However, if there is vital information in your slides you have plenty of options:

- If there is technical back-up available, take a break and get it sorted out.
- Always take a printed copy of the slides with you - you can hold them up if it's a small group.
- You may be able to get the slides photocopied and handed out.
- You can draw on a flipchart/whiteboard using your slides as a guide.
- Use the slides as prompts for yourself and continue to talk and use your other materials.
- If there aren't many delegates they may be able to crowd around your laptop if necessary.

Watch Out!

If you get really interested in creating great graphic displays and appealing to the viewers' senses, then be careful that you don't get too tied up in creating the world's most fabulous PowerPoint presentation at the expense of everything else. It's important to remember that it's only there as a tool to help you convey your message. You still need to rehearse, practise, review and prepare your other materials. (This warning comes from bitter experience - it can become so much fun making sure the pictures whizz in the right direction and that the music fits in with the timing of the slides and that the colours are all beautifully blended...) Cheat to speed things up - don't get too immersed.

Case Study

An colleague was asked to provide some training on a very dry topic to some up-and-coming legal eagles. The first thought was a standard bullet-pointed PowerPoint presentation - the sort of stuff that we are all familiar with. During a 'Get fancy with PowerPoint' course he was able to explore the options in PowerPoint fully and the final part of the course became an opportunity for all delegates to design a more creative presentation for him. They wrote a story (with animated illustrations) based upon the learning objectives. Using automatic Slide Transitions (Slide Show menu) the story told itself - until just before the end, when the trainer stepped to the front and encouraged the delegates to finish the story. They began their learning with a far greater degree of interest than was usually engendered by risk management.

Did you know?

There is a feature called Pack and Go so that you can package your presentation to run on another computer. It takes up less space (like a Zip file) so is better to e-mail and can be run on computers that don't have PowerPoint installed. Select File from the menu and a Wizard will guide you through the process. If you want to run a presentation on a PC without PowerPoint you will need to download the viewer too - the Wizard prompts you.

How to prepare

- Plan what you want to cover. If you're preparing a training course you can Mind Map the whole programme and use that as an introductory slide.
- How do you want it to look? There are lots of themes and design templates available in PowerPoint or you can get fancy and begin to create your own.
- Create a master slide. It'll save a lot of work. Master slide templates are available, or you can give slides your own look.
- Use your company's master slide. This is an easy way to go with the corporate image, but be prepared to do something new if you're trying to make a difference.
- Use your points as prompts for yourself as well as your audience. You can throw away your notes, or use the Notes available at the bottom of every slide.
- Do you want to include sound as well as pictures? There are lots of noises to add impact and you can tie in whole tracks of music for concert reviews and so on.
- Do you want all your information to appear at once or to be presented gradually?

Look out for what works

- Study other presentations, graphic displays, messages and so on with impact - for example on TV and advertising hoardings and in magazines. Notice what conveys messages most effectively.
- Copy slides you have made before.

Use music/sounds

Music or sounds can enhance a presentation or training session enormously (pay heed to the usual warnings about making sure you have copyright/licences etc.). Be careful how often you use cute, catchy little noises - they may not seem so cute and catchy by the end of the day.

The concert review

Do you ever get that sinking feeling at the end of a course when the trainer asks you what you've learnt? You were concentrating at the beginning of the day, but that now seems so long ago. Instead of making your delegates feel like that, ask them to sit back whilst you play them a concert review. All the visual images you've used come floating gently back to them whilst in the background a piece of music to stimulate beta brain waves anchors their memories. Use

Slide Transition in the Slide Show menu to alter the length of time for which slides appear. You can use Rehearse Timings (also in the Slide Show menu) to ensure that the visuals and the music match up.

If you are using music you may need to amplify it if you're playing it from a laptop or PC (I cart a small Fender P.A. amplifier around that does the job!).

Make it easy

PowerPoint (especially the most up to-date versions) has huge capabilities that you can use to create fabulous-looking slides, handouts and so on.

- Use the Insert Charts facility to create graphs from, for example, Excel spreadsheets.
- Insert clip art or your own pictures or videos.
- Use the themes, layout and design templates.

Training approach

- Honesty
- Sharing ideas
- Having fun
- Go for it
- Confidentiality
- Asking questions
- Speaking for self

Fig. 2: A visual image versus bullet points

Graphics/animations

Words are really important - but bear in mind the power of the visual image. Slides with pictures can do the same job as a list of bullet points. Compare these two slides in Figure 2 and decide which you'd rather have.

You can animate your pictures (and words) to add interest and gain your audience's attention.

Here is an example. In one of my previous jobs I experienced a standard bullet-pointed presentation about moving targets that included a single animation - a cartoon bird flying through the air that eventually got hit by a cannon ball. It is the only thing I, or anyone else from the company, remember about that presentation. People smiled when they saw it, and that engaged them far more than the endless bullet-point slides that went before or after. Incidentally, we were asked to remove the bird because it was flippant!

However, it is important not to let people get so involved with the animations that they stop listening to you.

Interactive presentations

You can create interactive presentations using hyperlinks (Insert menu) between slides, files or the web, and action buttons (Slide Show menu). That way you can ask the audience which way they want the presentation to go. It is also possible when running a course to change a presentation in the breaks to take account of delegates' needs - remember to take a copy of the original first.

Practice

Before delivering any presentation, the most important thing to do is practise - and you need to practise your entire presentation with PowerPoint included. Test projection onto a screen - things can look very different when enlarged. Test it out on various PCs if it is a presentation that other people may use too - older versions of PowerPoint may not display the same, fonts and animations can differ, and different screen settings can cause all sorts of misery. Also laptop colours may not match desktops.

Move around to make sure that you can realistically get back to the PC to switch to the next slide - or have an infra-red mouse!

Check that the PC and projector are compatible - practise connecting them.

Good practice for PowerPoint presentations

Layout

- No more than seven words per line
- No more than seven lines per slide.
- Only make four or five points per slide - visual or verbal.
- Leave a margin of approx. 2 cm around the slide.
- Don't clutter the slide.
- Use graphics to illustrate points.

Colour

- Don’t use more than four colours.
- Be aware of contrasts that are hard to see.
- Be aware of red/green combinations in particular – colour blind people often have difficulty with these.
- Colours can be used to enhance the mood of the presentation,

Formatting

- Lower case is easier to read than capitals.
- Sans-serif fonts are easier to read on a screen.
- Fancy lettering is harder to read.
- Don't use too many fonts.
- Font sizes: 18 pt minimum, 28 pt for main text, 36 pt for, main headings.

Storytelling: how to enrich the learning experience

By Sue Lickorish

Key learning points

- Why story and metaphor are so important in learning.
- Story and metaphor defined.
- When to use stories.
- Choosing appropriate stories.
- How to craft your own stories.
- Putting real-life stories into action.

Why stories

In the book Steps to an Ecology of Mind, Gregory Bateson tells of the man who wanted to know about mind, not in nature, but in his private large computer. He asked it, 'Do you compute that you will ever think like a human being?' The machine then set to work to analyse its own computational habits. Finally, the machine printed its answer on a piece of paper, as such machines do. The man ran to get the answer and found, neatly typed, the words: 'That reminds me of a story ...'

Stories are so essential to how humans communicate that we cannot not tell them. They're how we understand each other and our world. Thousands of years ago people didn't manage knowledge with databases and hyperlinked filing systems. They didn't spread wisdom by means of whizzy, bullet-pointed slide shows. They told a lot of stories.

We haven't changed much since then. We still love stories because that's the way our brains are designed. Human brains naturally make meaning and connections, so we identify with characters and storylines. The links we find with our own experience afford us new insights and new resources for change and problem solving. A real advantage of using stories for trainers is that you can activate conscious and unconscious learning at the same time.

So what exactly is a story?

It's easier to say what isn't a story. I like storyteller Pamela Gawler-Wright's definition, because it's really inclusive: 'To tell a story we must tell a sequence of events that occur in a different time and/or a different place.'

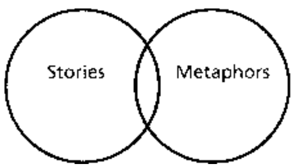
So, if we're describing what's happening here and now, we're seeing, hearing and physically experiencing it as it is. In other words, we're delivering a commentary. It's not a story because our imagination isn't involved. But when we tell others about a sequence of events in another time or place we - and the listeners - have to create the elements mentally and fill in the gaps with our imaginations. Stories are powerful because of what they invite us to create.

And what is a metaphor?

We need to compare things to understand. Metaphors make us think about one thing in terms of another; they bring life to the literal and make abstract concepts more tangible. Our understanding becomes richer and more complete through metaphor.

What is the relationship between a metaphor and a story?

Stories contain a sequence; metaphors may not. Stories are often, but not always, metaphors. Metaphors are often, but not always, stories. I see them as overlapping circles:



Putting real-life stories into action

Working with storytelling in organisations, I have found that clients often don't realise how powerful grapevine stories are. Non-smokers often miss out on the stories in smokers' corner - it's the first place to pick up news and gossip.

Recently, I was helping a corporate client to generate some authentic 'values in action' stories - stories about people actually doing what the organisation wants to encourage-for instance going the extra mile or finding a creative solution. What they noticed about their organisation once they'd started thinking along those lines was interesting. 'Values in action' stories are a hundred times more effective at spreading messages than those little plastic cards printed with the company's core values.

Think about your company induction programme for a minute. Induction is an opportunity to engage hearts and minds, to convince joiners they've made the right decision. Let me tell you about a programme in which current staff share success stories and real-life company hero stories. Participants tell their own stories that connect them to the shared space. And a senior representative tells the organisation's vision story like they really mean it - no faking it. People need a vision story that moves them, that they can connect to and that gets them out of bed in the mornings. These trainers are leveraging stories that embody corporate culture and values.

What about delivering a story?

I'm reminded of a Zen story about a master calligrapher who was working on some characters while one of his most perceptive students was watching him. When he was finished, the master asked the student for his opinion of the work. 'It is no good,' replied the student. The master carefully repeated the characters, and again the student said the work was no good. This happened several times, and each time the student was not satisfied. In due course, the student's attention was called elsewhere. While his back was turned, the master seized the moment to pen the characters swiftly. 'What do you think of that?' he asked the student. The student turned to look. 'Now, that ... THAT ... is a masterpiece!' he exclaimed.

Why stories are so brain-friendly - the science bit

Remember the secret passages on a Cluedo board? They act like an instant gateway to another part of the board. In a similar way, your limbic system (mid-brain) contains the portals to long-term memory. Listening to a story evokes images, sounds and emotions that stimulate the limbic system and give the message a turbo-boost into long-term memory.

Telling and listening to stories automatically involves both our left and right hemispheres - the left side figures out the sequences and the detail, while the right side is busy generating sensory impressions and the big picture. The corpus callosum - the bridge between the two - builds muscle as it shunts information back and forth.

Learning is about making connections and distinctions. Story and metaphor help us to link new learning with what we already know, which creates stronger neural firing patterns and therefore stronger memories. Listening to a story takes the pressure off conscious thinking, evoking a learning state of relaxed curiosity - ideal for opening the unconscious mind to messages within the story.

People need a vision story that moves them, that they can connect to and that gets them out of bed in the mornings

When to use stories

Most training benefits from being enriched by story and metaphor, but I do believe it's possible to go over the top. I was talking to someone who'd done an NLP practitioner course with a famous trainer who is known for telling 'nested' stories the whole time - the effect is mildly hypnotic, designed to maximise unconscious learning. He had come away from the experience with little conscious awareness of what he'd learnt. Personally, I think it's important to balance conscious and unconscious learning, so I go for a mix of styles, bearing in mind my aim to keep the ball in the learner's court at least 70 per cent of the time.

Fifteen ways to use stories in learning

1 To introduce or wrap up a presentation/learning event.
2 As a 'pre-frame' or context builder.
3 To build rapport.
4 To maintain a theme for an event.
5 To illustrate a teaching point.
6 To make learning multi-sensory.
7 To give examples.
8 To share knowledge.
9 To transmit values.
10 To respond to questions.
11 To evoke and influence states.
12 To resolve or reframe difficult group situations elegantly.
13 As case studies/discussion starters.
14 To teach facts and sequences.
15 To communicate a vision.

You can probably think of more. A single story will spill over into several of these. Take a look at the stories in this module: how many of the above do they illustrate?

Choosing appropriate stories

Stories in learning don't have to be all deep and meaningful. I like to use stories to get people fully immersed in a subject. When I used to run customer care training I'd get learners to share their own experiences of great - and lousy - customer care. It was fascinating how that also highlighted people's values. I might tell of an evening out with friends when we tried out a smart new bar. The bar manager clearly loved his job -'going out of his way' to please was his standard level of service. Before they closed the restaurant downstairs, they delivered some surprise freebies - fresh, hot snacks on a platter of authentic hospitality. The service was ten times better than anywhere else locally ... they really cared that we had a good time.

Not just soft stuff

In case you think stories are just for soft skills, think again. There are some brilliant examples of stories people have created to teach such things as the order of the planets and health and safety processes. Stories make it easy to learn sequences in a whole-brain way.

Whether long, short, serious, funny, real or made up - the trick is to find a story that's right for your purpose. Collect relevant examples of:

- parables;
- hero stories;
- wisdom stories;
- myths;
- legends;
- folk tales;
- fairytales;
- real life (your own or others');
- historical events;
- leadership;
- success;
- anecdotes;
- funny stories and jokes.

It can be hard to think of a story out of context, yet you'll probably find that just the right story comes to mind when you're in flow and you need it.

A word on congruence and storytelling

Some people tell someone else's story as if it's happened to them. I personally don't tend to do that because I think it's important to be congruent as a storyteller. If the story is already in the public domain, there's a chance you'll get caught out. But I do often use other people's stories, prefixed with things like:-

- I was chatting to a friend/colleague who had …;
- I recently/once heard a story about …;

- [Famous person] tells the story of …;
- Did anyone see on the news …;
- There's a great story about …

What's a good way to create original learning/training stories

I was thinking about this as I sat in the garden on an unusually warm spring afternoon. I was beginning work on this module and my mischievous 4-year-old kept stealing my pen and papers. She was merrily swapping them for a selection of furry toys.

As I pleaded for my pen back, I could feel my irritation beginning to rise. 'I was just being helpful,' she said sweetly. Just as I was about to grumble that she was interfering with my work, I stopped myself. I chose instead to enjoy the moment and my daughter's playful tricks. I thought of all the people stuck inside workplaces on that glorious day and remembered just how lucky I really was.
And then a thought popped up: how could I use this in my module? How about demonstrating how easy it is to craft a story from a snippet of your life? I believe there's a gift of a story in pretty much anything, and if we're observant we can catch it and draw it out.

The way I develop this kind of story is to jot down a few notes and run through it in my mind. What I'm noticing are messages in the story and the kinds of situations I could use it for. I think how it might go down with different audiences. In this case, some of the messages that sprang to mind were these:-

- We always have a choice of how we're going to respond to a situation.
- Sometimes we're so preoccupied with the past or the future that we forget to live in the present.
- Being grateful for small things every day is a great way to be positive, peaceful and happy.

In one-to-one coaching, I could use this story to help a client become aware of their choices. In a group facilitation it could be a discussion starter. In each case, the listeners' own experiences and the context will influence their interpretation. As Heraclitus said, 'It is not possible to step into the same river twice.'

What have you experienced recently that you can grow into a story for an upcoming event? Whether long, short, serious, funny, real or made up - the trick is to find a story that's right for your purpose

Where to find stories

It's like when you're buying a new car: once you've got your antennae out for stories you'll find them everywhere.

- Your own experience is an excellent starting point.
- Read a lot - newspapers, journals, books.
- TV/radio - news bulletins, documentaries, 'Thought for the day'.
- Pay attention to other trainers.

- Surf the net - type Storytelling into Google and you'll find thousands. You'll find teaching stories that have stood the test of time at:

www.rider.edu/-suler/zenstory/zenstory.html
www.aesopfables.com
www.zensufi.com/story.htm

How to evaluate training sessions

By Sarah Cook

Key learning point

- Evaluation is an important step in the ADDE model of development.
- 'Happy sheets' provide an instant reaction only to the training; there is little correlation between reactions and whether people have practised and transferred what they have learned to the workplace.
- In order to evaluate the effectiveness of training, HR professionals need to build in evaluation measures during the learning needs analysis.
- Best practice is to design methods to review the learners' progress during and after the intervention.
- Learning management systems can help capture data to measure the impact of the learning on the business.

Introduction

Designing and delivering training takes time and effort. It can also be a costly affair. How do you know if the training has been effective? What evidence can you gather that the learning has been transferred to the business? In this article, we look at methods of evaluating training and development.

Evaluation as an element of the training and development cycle

Evaluation is an important step in the ADDE model of development, which is shown in Figure 1.

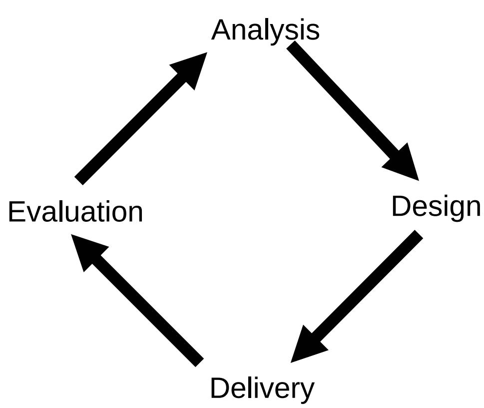


Fig. 1: The ADDE model

Analysis

Analysis (learning needs analysis or LNA) is the data-gathering element of the system. At this stage, managers, consultants, trainers and HR professionals assemble information about the development need. The resultant information and its analysis identify the nature of the need. The outputs of the LNA drive the design of the intervention to address the need and the subsequent delivery of the training. In addition, the LNA has an important part to play in the evaluation of the effectiveness of the intervention.

Design

At this stage, designers, working from the specifications derived from the LNA, create the outline and detailed content of the learning intervention. During the design stage, the course designers write and agree the learning objectives with the project sponsor. They construct the detailed course content and the lesson plan. Another output of this stage is the handouts, slides and other training material required to support the programme.

Delivery

The delivery phase of the project is when the design is implemented. This intervention can take many forms, from e-learning, workshops and seminars through to one-to one-coaching. When delivery is on a large scale, there is a need for quality assurance in this phase of the cycle, to ensure consistency of approach.

What does this mean in practice

When using this approach, there are some essential elements that training professionals need to undertake, to ensure successful evaluation of a training programme.

At the needs analysis phase

Don't forget to identify both the training objectives and the key performance indicators (KPIs) relating to the training. Ask the line manager / client questions such as these:

- What training is required?
- What is your overall aim in undertaking this training?
- What is/are the expected outcome/s?
- What business issues are you aiming to resolve?
- What are the specific objectives to be achieved?
- How did you become aware that there was a training need?
- Describe the type of problem that is happening now.
- How often does this occur?
- What evidence do you have?
- Is this problem related to gaps in skills, knowledge or behaviour, or a combination of these?
- On a scale of 1 to 10, how important to the business is this training need?
- What would happen if you did not address this need?
- What is the expected ROI linked to your business/team objectives?
- How could you evaluate this?

If you do not know what the expected business benefits are, it is very difficult to measure the benefits of the training.

In the design phase

- Ensure that learners attend a pre-workshop briefing with their line manager so that they understand the relevance of the learning.
- Build in self-assessment of learners' competence and confidence in the subject area prior to the start of the training.
- Include exercises to test participants' learning as they progress through the training.
- Repeat the self-assessment at the end of the training, so that you can assess the learning against the objectives.
- Ask participants to rate where they would like to be in three months' time, and to develop a plan of action for how they will get there.

In the delivery phase

- Make sure that you include a learner reaction form after the training intervention (best practice is to send this out afterwards). Remember to gain reactions to the content - that is, the training sessions - so you know if any changes are required, including to the trainer and, if necessary, the venue.

In the evaluation phase

- Three to six months after the intervention, follow up with learners, to assess how well they have transferred their learning to the workplace. Also, revisit the desired business objectives with the line manager have the desired results been met? What are the gaps and how can these now be addressed?

This process, it has to be admitted, is time consuming. It can be helped by the use of IT systems, such as learning management systems that
help log and track the learning. By undertaking a proper evaluation, you will build up evidence of the benefits to the business and the individual, gained from the learning and development.

Evaluation

Evaluation is an important phase in the cycle, used to gauge the degree to which the desired learning outcome has been met in terms of individual and business benefits. Many businesses fail to put sufficient emphasis on this phase of the cycle, confining it to the 'too difficult' or 'nice to know' box, rather than the 'need to know' box. Alternatively, many organisations restrict this phase to happy sheets or learning reaction forms, which bear little correlation with the transfer of learning to the workplace and business benefits. Yet, if a thorough LNA has been undertaken, it can become a key driver of this phase in the cycle. The LNA establishes the desired outcomes of the learning - in terms of individual changes in knowledge, skills and behaviour as well as in organisational benefits. These performance indicators can then be measured after the learning intervention, in order to assess its success and business benefits - an invaluable tool in deciding which learning interventions to carry forward, as well as promoting the business benefits of the development.

Validation versus evaluation

There is often confusion amongst training and HR professionals about the best methods to use to evaluate the effectiveness of training interventions. The most common method of gaining feedback about the training session, as outlined above, is the issuing of happy sheets at the end of a training event. But what does this data provide? Merely a snapshot of people's opinion of the course, often gained as they are putting their jackets on and walking out of the door.

In fact, happy sheets and learner reaction forms are a method of validation, rather than evaluation. Validation of training and development is the measurement of the extent to which the training objectives have been accomplished. Evaluation is the measure of the worth or value of that training to the wider organisation, often in economic and financial terms. This includes both cost-benefit analysis and return on investment (ROI) measures. If an organisation relies on learner reaction sheets alone to assess its training, it is not evaluating the training effectiveness. Evidence shows that there is little correlation between how much participants like a course and the degree to which they practise their learning and transfer it to the organisation. Both validation and evaluation are essential elements in the training and development cycle, but they do different things.

Benefits of thorough evaluation

The benefits of thorough evaluation are as follows:

- It provides evidence of the extent to which the objectives have been achieved.
- It provides evidence of the learning gained by the delegate and the extent to which this has been transferred to the business.
- It ensures the training provided is fit for purpose.
- It provides data to identify where the content of the training needs to be revised.
- It provides evidence of the degree of confidence and competence of the trainee.
- It highlights additional training and development needs.
- It demonstrates the benefits and value of investment in training.
- It enables comparisons to be made of the cost and the benefits of different courses.
- It provides evidence to the business of the ROI of training and development.

Different evaluation models

A number of theories have been developed about the best way to evaluate training.

The best-known approach to the evaluation of training and learning is the Kirkpatrick model (1959).' Kirkpatrick recommends that evaluation takes place on four different levels.

Level one: Reaction

Assesses the reaction of a participant to the intervention provided.

Level two: Learning

Assesses what participants learned from the training, what they remember.

Level three: Behaviour

Assesses the changes observed at work as a result of what was learned. Do people apply, at work, what they have learned during the intervention?

Level four: Results

Assesses the final outcomes from the intervention. Did the behavioural change have a positive effect on the organisation?

Despite the fact that most trainers espouse this classic approach almost unquestioningly, there are important criticisms of the Kirkpatrick model (for example, Swanson and Holtonz) that should be considered. These criticisms are the following:

- Research has consistently shown that the levels within the model are not related, or are only correlated at a low level.
- Studies have shown that reaction measures have nearly a zero correlation with learning or performance outcome measures.
- The model assumes that most learning is obtained via training workshops. This is at odds with the growing trend of encouraging blended learning interventions.
- The model is not 'learner centred'. It does not place the responsibility for learning clearly on the learner.
- Four levels of data alone are insufficient to make correct and informed decisions about training programme effectiveness.

In practice, the Kirkpatrick model is not widely used. Despite its familiarity to the training world, a minority of organisations tend to evaluate training and development at an organisational level. Only 7 per cent of organisations surveyed in the United States evaluated the ROI in training.

Percentage of companies that use each level of post-training evaluation

Level 1 (reaction)	78%
Level 2 (testing for learning)	32%
Level 3 (behaviour change)	9%
Level 4 (ROI)	7%

Source: American Society for Training and Development, 2002 State of the Industry Report.

In the United Kingdom, 57 per cent of organisations surveyed in a recent CIPD poll said that evaluation was becoming more important, but only 27 per cent use action plans after training as a form of evaluation, and just 16 per cent use any other forms of follow up after training and development.

There are other evaluation models, many of which relate to, and build on, Kirkpatrick's evaluation process. These are set out below.

Warr et al. model (1970)

There are four categories of evaluation:

1. Context

2. Input
3. Reactions
4. Outputs

Hamblin model (1974)'

Hamblin developed Kirkpatrick's model slightly, by adding a level of 'ultimate value':
1. Reactions
2. Learning
3. Job behaviour
4. Organisation
5. Ultimate value

Easterby-Smith model (1986)

Easterby-Smith's model uses a different approach and more levels. It causes the evaluator to consider their perspective and purpose more thoughtfully:
1. Context
2. Administration
3. Inputs
4. Process
5. Outcomes
6. Organisational change

One recent model of evaluation, developed by Leslie Rae, draws on best practice and is linked to the ADDE cycle.

Rae's model (2002)6

1. Training needs analysis leading to training objectives
2. Design the evaluation process
3. Establish the business base level for post-training implementation to determine the ROI effectiveness
4. Pre-course testing of knowledge, skills and behaviours
5. Line manager pre-course briefing
6. Start of course testing or assessment
7. Interim assessment or validation
8. End-of-programme testing or assessment of learners
9. End-of-programme validation of training objectives
10. End-of-programme review
11. Learner action plan at end of the programme
12. Line manager post-course debriefing and support for implementation of learning
13. Medium-term follow-up and review of implementation of learning
14. Long-term follow-up and review of implementation of learning
15. Cost and value and effectiveness analysis by line manager
16. Assessment and report on achievement of the programme

I have adapted this model so it can be viewed in three phases (see Figure 2):

Acquire
What did the trainee learn?

Practice
How have they practised this?

Transfer
What learning have they transferred to the business and what is the business benefit?

This approach ensures a rigorous and documented analysis of transferring learning to the workplace.

Acquire			Practice	Transfer
TNA identifies training objectives and KPIs Training design incorporates evaluation process Manager provides pre-course/learning briefing	Start of learning assessment of training objectives Interim assessment or validation where appropriate End-of-programme assessment or testing	End-of-programme validation of training objectives End-of-programme reaction questionnaire	Learner Action Plan at end of programme Learner rating of desired level of competence and confidence in 3 months' time	3-month follow-up review of participant's implementation of learning 6-month follow-up review of KPIs

Fig. 2: Adapted model

The above is an extract of the ‘Train the Trainer’ reference book by Fenman Publishing