



The Training Process

Learning Outcomes

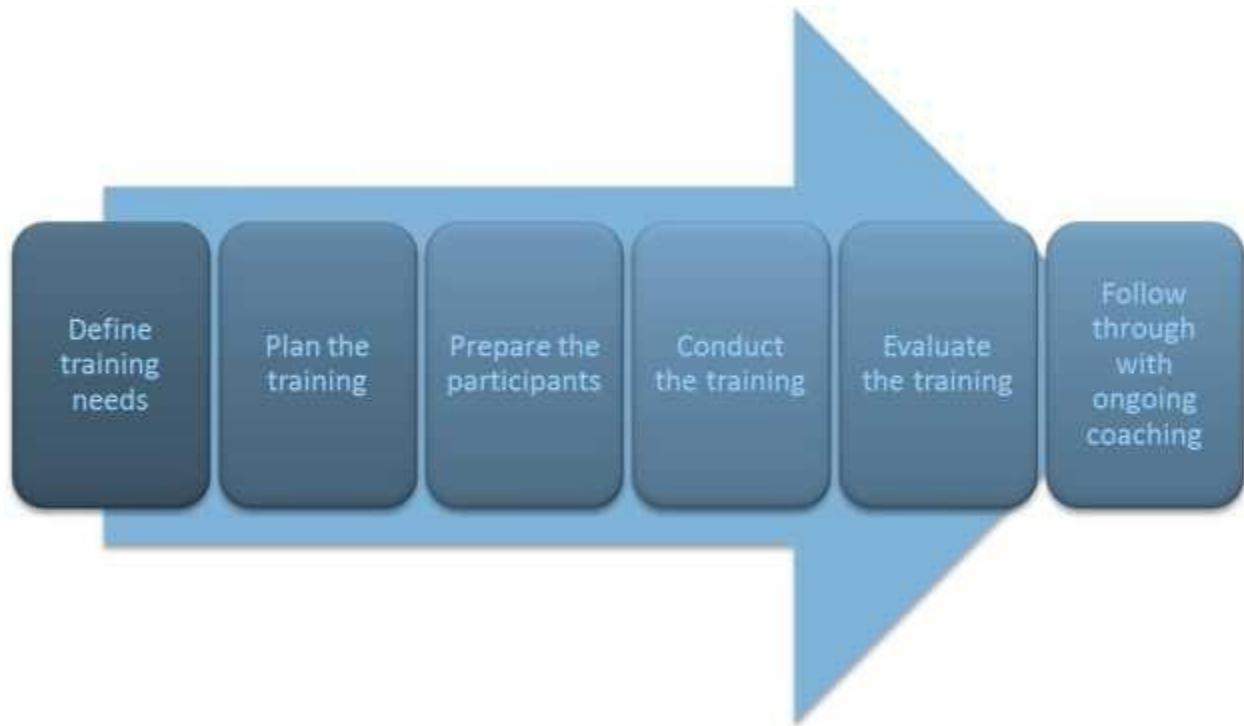
By the end of this unit the learner will be able to:

- ☐ Know how to write objectives and evaluate whether these objectives have been met at the end of a training session.
- ☐ Develop an effective training style, using appropriate training aids and techniques.

The Training Process

Process in Brief

There are six basic steps in the training process.



For a trainer, the training process is cyclical and repetitive. Every time that you begin to consider training, you must evaluate what is needed and whether training is the best approach. Then, training goals are established as part of the planning process. However, it is during the evaluation process that we learn whether or not these goals were attained. We can only see whether the training stimulated some kind of lasting change in the workplace if we follow up afterward.

For the rest of today, we'll look at how to plan your training. Tomorrow, we'll talk about how to prepare employees and conduct and evaluate your training.

When is Training Necessary?

Signal	Type of Training Required
Customer dissatisfaction	

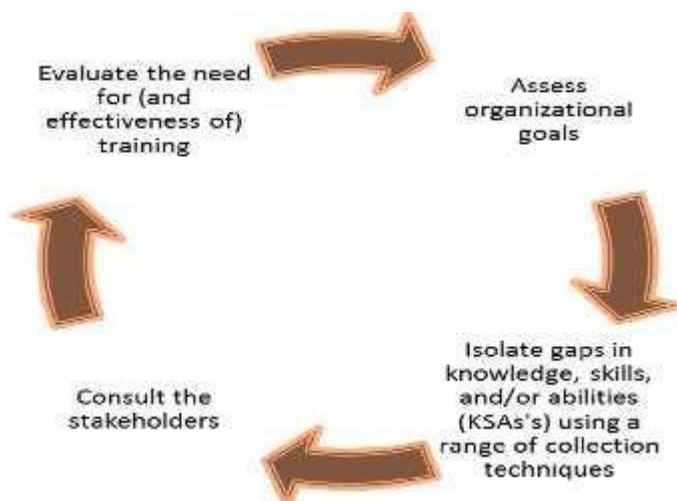
Disorganization and confusion	
Low morale	
Low sales	
High waste	
Low productivity	

Three Steps to an Efficient Needs Analysis

Overview

When you are ready to undertake the training needs analysis, using the term ICE will ensure that you include all of the necessary steps.

- **Isolate** the problem.
- **Consult** with appropriate stakeholders to and assess the effect the problem is having on the organization.
- **Evaluate** options and set up an action plan that meets organizational needs, and assemble the support that you need.



Isolating

Isolating the problem effectively will help you to determine whether there is one main issue or whether several smaller issues are having a significant impact. Several techniques are available for this process, and each has its own benefits and shortcomings. Sometimes a mixed approach is best (if time and resources are available) in order to get the most comprehensive answer.

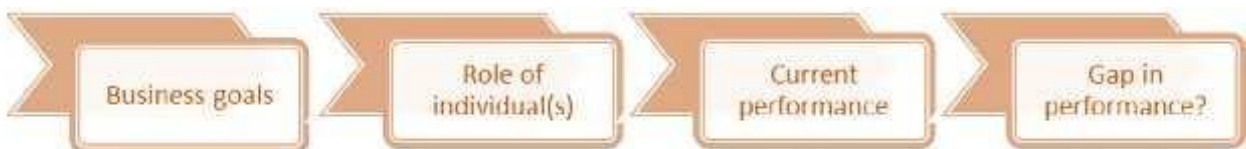
Techniques may include:

- Observation of people as they work
- Questionnaires
- Consultation and interviews
- Testing
- Reviewing work samples
- Reviewing documentation included in employee evaluations
- Policy manuals
- Audits
- Program reports

You are looking for **surface problems**, such as an obvious need for skill development, where employees need to learn new skills in order to perform their tasks effectively. You also have to be able to identify **underlying problems**. These can be more difficult to define, but they are an important part of a thorough analysis.

An additional benefit of isolating the problem is that it can help you to obtain **background material** that you can draw on for training. Using real, concrete examples in your case studies and training examples makes the training much more meaningful for participants. In addition, trainees who do not enjoy training, or who find it difficult to learn from artificial scenarios, are more successfully engaged in training that uses real examples.

Having a process to follow as you isolate the training needs can be helpful. Here is one way to consider your needs analysis:



Consulting

Sometimes employees would like training, but that training does not support the needs of the organization. You will find it very difficult to gain approval and resources for training that does not fulfill the **strategic plan**. However, if the company is not aware of gaps in an employee's knowledge, then part of your role can include reporting where the problems are and resolving them by designing an appropriate training plan.

If you can identify the problem areas, relate them to the organizational strategic plan, and demonstrate the value of training to the organization (their return on investment, or **ROI**), then you are much more likely to receive support for the training initiative.

For example, an employee with excellent technical skills who gets promoted to a supervisory role needs to understand the dynamics of leadership, motivation, and performance management. Training can help to solidly establish the person in their new role, which can often be challenging when a team is making a transition from having a co-worker become their new boss. Training will also help the new supervisor gain confidence and understanding of their leadership role. These key skills will help the new manager work more effectively, meaning the company gets more for their money.

This formal type of assessment will help you identify the following:

- The objectives of the organization
- Gaps between what employees currently know and what they need to learn
- Training that is required
- Training that would be nice to have
- When training may not be needed, or is not the right approach
- The benefits and negative aspects of providing training
- The type of training that is appropriate
- The best approaches to deliver effective training
- A method for collecting feedback and evaluating the program

Evaluating

Depending on the needs identified, you will then determine the best methods of training to use and include the details in your training needs analysis. Adults learn in different ways, so using a variety of training methods keeps learners engaged and interested. On-the-job training, mentoring, workshops, seminars, conferences, peer training groups, cross-functional experiences, teleconferencing, webinars, eLearning, and mLearning (mobile learning) are just some of the ways to enhance traditional classroom experiences. In addition, varying the time allocated or the location can also enhance training. Effective instructional design is a key skill for trainers to develop.

When is Training Not Appropriate?

When there are problems within an organization, the first answer may be to offer training to staff. When staff are bickering and fighting, we may want to offer training in anger management or conflict resolution. When a new process or tool is introduced, we offer skills training.

Whether the training focus is knowledge, skills, or attitude (collectively known as **KSA's**), training may be the best approach. However, there are other factors that can lead to sub-optimal performance on the job.

When these issues are present, training is not going to resolve the problem.

- Unclear feedback or unclear performance expectations. If people do not understand what they are required to do, how will they meet the objectives?
- Lack of resources (tools, materials, equipment) needed to do the job.
- A poor match between the employee's skills and the job requirements.
- Factors stemming from illness or injury, such as pain, depression, symptoms of stress, or decreased ability to cope.

Help! I Need a Template!

Some of you will be flipping through the pages looking for a template that will help you to create the most effective needs analysis ever. This is tricky to provide, since every organization, situation, and result will be different. In fact, it is those unique factors which make completing a thorough analysis so important, and provide you some space to be creative.

Create your needs analysis in the form of a report and ensure that the following elements are included. Remember that you may have to add a few more components depending on the situation, or remove some; just make sure that what you do gets your point across clearly.

Sample Needs Analysis Outline

- Explanation of training versus other methods
- Goal(s) of proposed training
- Description of employee or target group for training
- Description of methodology used to gather information, such as:
 - Interviews
 - Surveys
 - Questionnaires
 - Meeting with team supervisor
- Data analysis
- Analysis of information gathered, such as:
 - Employee profiles (including gaps identified)
 - Recommended training
 - Priority or recommended timing for training
- Limitations of the training (i.e. any gaps that training cannot address or limitations as identified from the research methodology, employee profiles, context of interviews, etc.)

Once the report is written, it should be submitted to the person who requested it or who is responsible for training outcomes in the organization. You should also schedule a meeting with that individual to address any questions or concerns and to move ahead with the training plan.

Planning Training

Developing Objectives

Now that you know what trainees need, you can develop some learning objectives or outcomes.

Determining Objectives

At the program design stage, you probably won't include every single learning objective that the program will encompass. Usually, objectives are broadly defined at the program design level, and then more narrowly defined during the lesson planning stages.

It is common to see objectives start with a phrase such as "By the end of this training session, participants will..." or, "By the end of this workshop, you will be able to..." We have deliberately left those phrases out of these statements to help you to focus on the essential message.

When designing a program for training supervisors the essential elements of health and safety, the **program objectives may include:**

- Become familiar with the basic concepts of health and safety legislation
- Understand the elements of complete incident investigations
- Apply hazard and assessment and control factors
- Explore the fundamentals of safety inspections
- Explain the basic elements of disability management and return-to-work planning

Within each of the bullets above, however, several objectives will be further defined. In the case of the second bullet ("understand the elements of complete incident investigations"), the objectives would be **more narrowly defined** as:

- Define key terms such as near miss, incident, serious accident, direct cause, and root cause
- Explain the purposes of incident investigation
- Report and investigate an incident
- Analyze incidents for cause and calculate the effects
- Provide concrete recommendations based on cause analysis

Your objectives can be enhanced by including a measurement standard to ensure that trainees understand the expectations, and to give you an effective way to document the learning that has taken place.

Common measurement terms include:

- Accurate on _____ out of _____ attempts.
- At least _____ percent correct.
- At least _____ per hour.
- In the correct sequence.
- With no more than _____ errors.

- While following all safety rules.
- Within _____ minutes.

Considerations When Writing Objectives

Target Audience

As you think about your objectives, also consider your target audience. This allows you to focus the objectives specifically on what the trainees require, which makes the most of training resources that are available to you. A course that is designed for brand new sales people will consist of different objectives than one for sales executives with twenty years of experience. Similarly, a course on anger management strategies will be different for front line staff than managers who look after those same front line staff. The more you know about your intended audience, the more meaningful (and less generic) your training program can be.

If you are assigned a training program but are not familiar with the participants, an informal survey of managers, previous trainers, and the trainees will help you get to know them. If time is short or you are conducting a public training session where that information is not available, having some different activities or approaches to parts of your material will allow you to make changes on the fly if possible.

Prerequisites

If it is necessary for trainees to have some level of knowledge before undertaking training, then identifying prerequisites (courses that must be successfully completed prior to the current training course) is helpful. With adult learners it is also helpful to remain open to equivalencies, meaning that if a trainee does not have a particular prerequisite course but has sufficient experience in the subject matter or can demonstrate their expertise to you, then the prerequisite for that individual can be waived.

Types of Objectives

Setting objectives helps to ensure all needed information is included in the training. It also tells you what will be measured to determine the effectiveness of that training and helps to communicate the potential value for the organization that approves your training program. Some trainers establish their objectives according to a specific model or criteria. Generally, objectives fall into one or more of the following categories.

Knowledge Objectives

Knowledge objectives relate to facts that a trainee can recall and apply at appropriate times. These would include such things as describing organizational charts, describing who their direct reports are, and who to submit a training proposal to for approval.

Skill Objectives

These are probably the easiest objectives to identify. Skill objectives teach someone how to do something specific. They are either related to a physical task (such as turning on a computer) or a cognitive task (such as calculating the tax on a purchase).

Attitude Objectives

These objectives relate to awareness that will bring about changes in attitude. These objectives can be difficult to measure since they cannot be tested or demonstrated easily. They may also be difficult to write and take some practice, but they do get easier over time. Attitude objectives are common in new employee orientations (where the history and purpose of an organization are shared with new hires) and when topics like diversity or motivation are the training goal.

KSA's

These three categories are often referred to simply as KSA's. Differentiating between the type of objective (whether it is a knowledge, skill, or attitude) does not mean that objectives are unrelated. Having the capacity to learn a skill objective generally assumes that the attitude already exists, and that there is some background knowledge as well. For example, calculating tax on a purchase would require someone to have an applied knowledge of math skills, as well as an understanding of how important it is to perform work accurately to support the goals of the organization.

Setting the Scope

In order to decide whether a particular objective will be included in a training session, ask the following questions for each objective you plan to include.

- How many employees perform that particular task or function?
- How much time is devoted to performing the task or function?
- How critical is the task or function?
- How often is it performed?
- How difficult or complex is the task or function?
- In what ways could an employee's safety or success on the job be threatened if the task is not learned in this training session?

If a particular objective is aimed at only one or two employees and is not critical to the task(s) they perform, you may want to re-think including that objective in your program.

Writing Tips

Objectives need to be written in a way that is easy to understand. Apply specific action verbs so that participants and whoever evaluates your program can effectively assess the goals.

The following chart includes terms to avoid when crafting your objective statements, because they tend to be vague and can be misinterpreted. If you use a term in the behavioral column when you are tempted to use a vague term, you will be better able to evaluate your results.

Desired Skill	Vague Term	Behavioral Term
Knowledge	Know, learn	Write, define, repeat, name, list

Comprehension	Understand, appreciate	Restate, discuss, describe, explain, review, translate
Application	Apply a thorough knowledge of	Operate, demonstrate, use
Synthesis	Establish creativity	Compose, propose, plan, design, manage, organize, prepare
Evaluation	Show good judgment	Evaluate, rate, select, estimate, measure

Verbs for Writing Clear, Concise Training Objectives

- Add
- Arrange
- Assemble
- Build
- Calculate
- Carry
- Choose
- Collect
- Color
- Compute
- Demonstrate
- Count
- Describe
- Distribute
- Draft
- Estimate
- Explain
- Identify
- Initiate
- Label
- List
- Rewrite
- Select
- Supervise
- Train
-
-

Test your knowledge

Writing Objectives

As trainers, we should try to convert the identified needs into behavioral objectives or outcomes.

What would you consider as training objective(s) for each of the following training courses?

Customer service training

Young driver training

Skills for new supervisors

Researching Content

So far we have reviewed several of the essential components of a training program. Now we will focus on the information that will be presented during training. We don't want participants to think, "Hey, I have all this great information about how to get the program going, but what will I actually teach?"

The content being delivered stems directly from the training objectives that are set. It will be influenced by several factors, such as the trainees' motivation to attend training (was it their own idea or a mandatory course?), their learning style, and the trainer's preferred training style. Other factors will include available resources, time available, and the trainer's skill level.

If you are designing a brand new program, then there are several ways that you can research and develop your content. **Remember to keep the quantity of content at a moderate level.** If participants feel rushed or overwhelmed by content, they will not actually learn the information that you are presenting. Focus on the objectives that you have designed and try to keep a common theme running through the course.

Use appropriate resources. If you are developing a technical course, then there will likely be instruction manuals, procedures, and processes for you to draw from. The reference material that you use must be up to date. If you are facilitating a course about a software program, keeping current is essential.

If you are developing a more theoretical course, say something in the human resources area, then you will have to carefully review sources that you use. Fads and trends that you are not familiar with can derail your training efforts. People do not want to attend training and receive the "flavor of the day" that they perceive will change next year (or next season) and require that they come back for more of the same training.

Participants need information that they can apply, so your program must also help them transfer what they learn into the work environment.

Test your knowledge

Planning an Interactive Program

Next comes planning the workshop or course so that the overall nature of the session will be participative and participant-centered rather than one-way and instructor centered.

Outline how each of the factors below may have a positive or negative effect on the training outcomes.

Size of the group

Length of the workshop

Pre-assignments

Threatening activities

Support materials

Other resources

Opportunities to practice

Take-home worksheets/assignments

Content

Training methods

Choosing Training Methods

Training Methods

Choosing the Right Method

Many trainers have their favorite training methods and know what works best in different situations. However, some methods are more effective and appropriate than others, despite what we might be most happy with. As trainers, we must analyze the objectives and design training that will lead to optimal results.

For example, some people do not enjoy games or think that they are frivolous in a work environment, despite many games being ideal for problem solving. Some participants enjoy the impact of a video during training, despite the reality that those videos are created for very specific contexts and meet only very limited objectives. Role playing has great potential in facilitating knowledge retention, but many participants dislike role plays.

The methods you choose must be related to instructional objectives, such as problem-solving, developing interpersonal skills, or managing time, but this isn't always practical. Methods may have to be selected in relation to organizational and/or participant acceptance. If an organization truly frowns on games as too frivolous, or participants resist role plays because they find the experience embarrassing, you will have to find another way.

Depending on the number of objectives you are covering and the length of time available, your training plan should incorporate several methods. This will appeal to different learning types and keep your training dynamic and interesting. This does not mean that you are creating a show. It means that you are respecting the range of learners and keeping training interesting for everyone.

Certain methods are of minimal effectiveness unless supported by other ones. For example, a video presentation should be combined with other methods, such as small group discussion or role play.

Overview of Common Training Methods

Method	Use	Example
Individual Instruction (one-on-one)	To teach an important or complicated skill.	Running a machine.
Group Instruction	To give basic facts that can be explained off the job.	Explaining importance of an operation or the reasons for a new method.
Lecture	To give basic or supplementary information on a specific subject.	Explaining general information, such as a group orientation to company history and philosophy.
Demonstration	To clarify grasp of manual skills or to highlight a key problem or principle.	To show the right way to use tools or to show a solution to a problem.
Conference/Course	To solve problems and/or to direct or change attitudes.	How to prevent breakage or how to better control absenteeism.
Case Study	Can include a desired outcome, or can be open to allow analysis and discussion about an outcome.	Using real scenarios, ask specific questions for small group discussion. Be sure to transfer learning points to the workplace.
Meeting	To exchange information and get the ideas of a group or to solve immediate problems.	Department safety meeting or supervisory meeting.
Written Instruction	To provide important information in permanent form for immediate or later use.	Procedure for stock-taking or policies for bonus pay.
Oral Directions	To give information needed immediately in short form.	What job to do next or where to send a special order.

Method	Use	Example
Experiential Simulation	Lab exercises or problem solving exercises	Provide practice and reinforcement. Can be time or space intensive.
Self-Directed Learning	When learners have some background already and are self-motivated. Should be used after benchmark testing.	Includes reading, computer based modules, videos, research, writing. Best when combined with other training methods.
eLearning	Self-assessment and self-directed learning.	Tutorials as a way to review skills or courses on how to use computer software.

Summary

Various methods can be combined to form an instructional strategy. For example, behavioral modification might include:

- A talk to explain the skill area to be worked on
- A video to demonstrate the proper behavior to be learned (modeling)
- Role play for participant to practice the skill in question
- Participants or the instructor critiques the performance and provides feedback

Environmental Concerns

A range of environmental considerations may also influence decisions concerning methods used. Here are some common factors.

Money Available

Training budgets can be limited. If you have no money to buy or rent a video, you will need to choose another method. If you have a DVD that fits perfectly with what you are attempting to teach a group, you may wish to include it.

Time

If you have to cover a lot of material in a short period of time, you will not want to show the group a 45 minute video that only covers one small aspect of what you want to cover.

Expertise

If you have never tried an exercise or a training method, make sure you have enough time to familiarize yourself with the rules, the equipment, or the directions, so you won't be embarrassed by results you never expected.

Support

If you try to introduce a role play to a group who have made it clear they don't want to do a role play, there will be little support for such a method, and the training may fail.

Trainer Philosophy

If your philosophy is that you are the expert and participants came to listen to you, you will lean heavily on lecture and large group discussions. On the other hand, if you want people to find things out for themselves, small group discussions and exercises might be your choice.

Physical Space and Equipment

If you don't have enough room for breakout sessions, for example, then you will want to choose exercises that require less room. PowerPoint presentations and movies require special equipment.

Class Size

Small groups are perfect for some training methods (such as videos and group discussions), but are less suited to other methods such as panel discussions and business cases.

Individual Exercises

Choose one training method to use in your upcoming presentation. Explain the method and share why you chose it. You are not limited to the methods discussed in this workbook.

My Top Training Methods

Type	Advantage	Disadvantage	Example

