Certificate in Training Delivery

iTOL

**INSTITUTE OF TRAINING &
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INTRODUCTION TO THE PROGRAMME

Using the *Programme* to develop yourself at work

A feature of this *Programme* is that it aims to increase your skills in the workplace. Thus while many of the Activities are designed to help you think more generally about the issues raised in the Module, others encourage you to relate those issues to your work, for example:

- by obtaining information about how things are done in your workplace;

- by carrying out particular projects;

- by talking to your manager and other colleagues.

These are called Workplace Activities and they should help you to improve your job performance generally by getting you to think about what you do in relation to what you are learning. We suggest that you may find it useful, as you work through the Module, to keep a working file for information or materials created as a result of Workplace Activities. Some of this work may be useful as supporting evidence for when you are assembling a Portfolio of Evidence for assessment.

It may be that you are not interested in evidence keeping, even so, you may still find it useful to look at and work through the Workplace Activities, just to see how the issues you are reading about relate to your job.

What if I'm not currently employed in training?

As we stated initially, the aim of this *Programme* is to help you function more effectively as a trainer whether you work full-time in training or whether your training activities are just a small part of your job. But it may be that you are currently employed in a totally different field, or are not employed at all, and are looking to use this *Programme* to help you get into training. In which case, you can do one of two things:

- you can ignore the Workplace Activities and concentrate on acquiring the basic knowledge given by the text and by the other Activities, etc.;

- you can apply the Workplace Activities to other situations, such as experience you have gained in previous jobs, in your leisure activities, or through voluntary work.

INTRODUCTION TO THIS MODULE

This Module examines a range of considerations to be borne in mind when delivering training sessions, such as:

- Do I need to 'teach' the learners or should they learn by doing for themselves?

- What are the various methods I can use, and which would be the most suitable?

- What are the various 'high tech' options and which would be the most suitable?

- How can I make best use of equipment?

- How can I manage potentially disruptive elements in a training group?

- How can I make sensible purchasing decisions with regard to training materials?

- How do I deliver an open learning programme?

There are a great variety of methods that can be used to deliver training, ranging from coaching a routine task to running a 'role play' exercise in management skills, and from giving a lecture or presentation on a factual subject to trying to change people's attitudes. Part 1 of this Module explores these various methods, explaining how to use them effectively and avoid pitfalls. It also looks at the distinction between trainer-centred and learner-centred learning, and concludes with a brief section on how to 'seal' the learning by giving effective feedback.

For successful learning to take place, the learner needs to be receptive, and although the suitability of the course to the learner's requirements will be the major factor, the environment in which the training event happens is also more important. Neither trainer nor trained can function effectively if the overhead projector is faulty or if the trainer keeps putting in the slides the wrong way round, while an inappropriately laid out room can provide a major distraction, as can a group with a disruptive element or that fails to cohere. Part 2 therefore looks at environmental factors such as equipment, room layout, and, no less important, the dynamics of the training group.

Much training today makes great use of materials, whether these are used as handouts on courses or as self-contained open learning manuals or multi-media programmes. Exercising discretion in their selection and use is a vital skill for those involved in training and Part 3 provides useful advice. Finally, a whole Part is devoted to open learning, an increasingly popular training method.

Objectives

When you have worked through this Module you will be better able to:

- demonstrate skills, methods and procedures;

- select, prepare and adapt group learning exercises, role plays and case studies;

- present information to learners;

- co-ordinate group learning to achieve learning objectives;

- select and adapt learning materials.

P A R T 1
DELIVERING THE TRAINING

CONTENTS

INTRODUCTION

In this Part we shall be looking at the main methods which you can use to deliver training to individuals and groups. There is a wide range of possible methods, but they fall into the following two broad categories:

- trainer-centred, tell and sell styles, which include coaching, demonstrations and lecturing. What these methods have in common is that the main focus is on the trainer whose role is to impart information;

- learner-centred, consult and join styles, which include coaching, discussion leading, exercises, role plays and case studies. Here, the trainer is more of an enabler, allowing the learners to draw their own learning from the event.

Most of the methods described in this section relate to training in groups. The exception is coaching, which is a one-to-one training method, and which can be trainer centred or learner centred depending upon the complexity of the task.

It is worth remembering that, whatever method you use, learning is a purely voluntary activity and you can never force anyone to learn; it happens best when the learner has direct experience of what he or she is attempting to learn. For this reason, learner-centred training methods are often more effective as they give the learner a greater degree of space to think for him or herself. However, there may be times when it is better to use trainer-centred methods, particularly for tasks for which there is a set procedure or where a lot of complex information needs to be got across in a short space of time. We will be referring throughout this Module to two basic types of task:

- reproductive tasks are routine tasks, often following a set procedure, where outcomes are clearly defined;

- productive tasks are those which include many variable elements, and which require adaptability to cope with special circumstances.

This Part concludes with a brief section on the main principles of good feedback, as although experience may be the basis of learning, reinforcement through feedback on our performance 'seals' it and makes sure it stays in place.

When you have completed this Part of the Module you should be better able to:

- explain the difference between trainer-centred and learner-centred methods of delivery;

- use trainer-centred methods of delivery such as coaching, demonstrating, lecturing and presenting as appropriate;

- use learner-centred methods of delivery such as coaching, discussion leading, exercises, role plays and case studies as appropriate;

- explain the role of feedback in the learning process;

- provide effective feedback to learners.

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1.1   TRAINER-CENTRED METHODS OF DELIVERY

Trainer-centred training implies that the trainer is playing an active role in delivering the learning, by giving instruction or by imparting information. We will look at each of the main methods, which include coaching, demonstrating and lecturing, in turn.

Coaching

Coaching is one-to-one training, helping one person to learn a task or a concept. Routine or reproductive tasks (eg. keyboarding skills) usually need a trainer-centred approach, while for complex tasks, and for those involving concepts and ideas (eg. writing a report, giving a presentation), it is far better to use a learner centred approach.

How can you coach a reproductive task in such a way as to promote learning? We have discussed the concept of the learning unit, which is a framework within which the necessary training can be developed to help the person become fully competent, in previous modules, but it will be helpful to have a brief recap here as it is particularly relevant to coaching for a reproductive task (although you should note that the same principles apply whatever the method of training delivery you are using).

The learning unit can be broken down into four distinct stages – objective, entry behaviour, learning event and performance assessment – and we describe each as related to coaching a reproductive task below.

1 – Objective

This defines the intended outcome of the learning unit, ie. what the learner should be able to achieve. You should state the performance standard required, giving the learner a clear and specific description of what has to be achieved. Because the task is reproductive, you should be able to perform the task yourself and carry out any task analysis that might be needed.

The more clearly defined and explicit the objective, the easier the coaching session will be.

2 – Entry behaviour

Entry behaviour is what the learner already knows, what he or her skills are, his or her motivation and what he or she is prepared to do. In addition, you also need to take into account the following:

- the learner may have already learned how to perform the task (but wrongly) and now faces the prospect of 'unlearning';

- you may not be a recognised 'skilled performer' of the task;

- the learner's reaction to the trainer-centred approach you are using may not be predictable.

3 – Learning event

Here is a step-by-step procedure which you can use to plan and implement a learning event for a task which is all, or partially, reproductive, and where the training is directed towards achieving competence in replicating a 'skilled performance' (in this case yours).

1. Have everything to hand. All materials, tools, and paperwork should be laid out in the correct position, with all instructional aids within easy reach.

2. Establish contact. Make sure you gain the attention of the learner before beginning instruction.

3. Introduce the task. Give its name, purpose and relevance to other tasks and the work in general. Explain the objective.

4. Demonstrate the task. Place the learner so that he or she has the same view as you do. Emphasize hand movements. Do the skill elements of the task several times until the learner seems to understand. Do not explain at this stage: let the learner concentrate on what is being done.

5. Explain hand movements. Explain any sub-skills that you use, and any procedures that may be difficult for the learner to see or follow.

6. Describe the senses used. Point out any senses of particular importance (eg. sight, hearing, feel), using such phrases as 'Push this in until you hear the click'.

7. Ask the learner to explain. To check the success of your explanation, ask the learner to name the points you emphasised. Correct any errors and ask the learner to repeat the points several times to ensure that he or she has understood.

8. Ask the learner to try doing the task. Let the learner try the skill, explaining what he or she is doing at each stage. Encourage the learner to spot any mistakes. Let the learner repeat the task to ensure that there are no errors.

9. Let the learner practice with the minimum of supervision. Check frequently to ensure that the learner is following the correct procedures.

10. As the learner approaches mastery of the task, introduce any target time appropriate to the task (ie. the time within which the learner should perform the task). Demonstrate how to achieve the task in the appropriate target time.

11. Now check again. Allow the learner to practice, ensuring correct performance within the target time. Watch out for any problem areas in performance.

12. Place the task in its context. Explain and demonstrate, where appropriate, how mastery of this task enables other tasks to be learned as part of the complete job.

4 – Performance assessment

You will already have defined the performance standards to be achieved, and the performance assessment (checking that the learner has achieved the appropriate level of performance) can therefore be fairly rigorous. Depending on the task, performance measures can be based on a suitable combination of the 'process' of performing the task, and the 'product', ie. what is to be achieved.

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- ***Process assessment*** is usually based on a performance checklist developed from analysis of the task. It draws attention to important procedural details of performance and can be used either by you as trainer or by the learner.

- ***Product assessment*** is concerned with the result of performing the task. This is usually something physical (eg. a piece of woodwork or a completed form) and is often fairly easy to measure and assess.

Some tasks require careful assessment of process rather than product. One of the advantages of coaching is that it is usually possible to assess both process and product, and often your assessment becomes an integral part of the coaching session.

The following Cameo describes how a trainer coaches a worker on using a stapling gun as part of making a chair.

◊ *Philip turned to Bob. 'Look, you'll never get the hang of that. Come here and I'll show you a simpler job.' He led Bob to a workbench, cleared away the material on it, and showed him the stapling frame underneath. 'See, all you do is hold the material like this over the frame, and then staple it around the edge of the chair seat with this staple gun. Mind you hold the gun flat on the seat or it will miss, and can even staple you.'*

Bob looked puzzled. 'Do you think you can do that?' Philip asked. 'Well I'll give it a try,' Bob replied.

'OK then,' said Philip. 'I'll get you some scrap pieces to practice on.' He went across the workshop and came back with some fabric.

'These are a bit thick for this machine, but they will do to try it out, OK?'

'What holds the seat in place?' asked Bob.

'I showed you that,' replied Philip crossly. 'There's a foot pedal under the frame that pulls the grips to hold the seat. Weren't you looking?'

Bob had a go with a few pieces, and Philip came by later. 'Well those don't seem too bad, but you need to pull the fabric a bit harder though. I'll show you how again.'

ACTIVITY 1
List three things that Philip was doing right, and four things that he could improve on in his coaching technique.

Philip has not really prepared this coaching session at all. However, on the credit side, you should have noted that he:

- points out the safety hazard of the gun;

- allows Bob some practice pieces to work on;

- is encouraging rather than negative upon his return.

These are the only things which he does well. You were doubtless able to list many more things that were very poor practice, such as:

- his opening remark to Bob is very negative;

- he has not prepared the coaching area;

- he did not check that Bob had seen or understood the use of the foot pedal;

- he does not ask Bob to have a try and explain what he is doing;

- he has no pieces (of the correct type) ready to practice with;

- he seems to be impatient, if not patronising.

Giving feedback when coaching a reproductive task

When you are giving feedback, bear in mind the two types of feedback which learners can receive. Some tasks contain *intrinsic* feedback, while others require *extrinsic* feedback. For example, if you are learning to ride a bicycle, and you fall off, you are aware that something is wrong. You do not need your elder sister to say 'You fell off then!' The task itself is giving you this information. What you need is the information which the experience of falling off is not giving you – how to stay up. You need the extrinsic feedback that going a little faster will make it easier to stay upright. This feedback is extrinsic because it is outside the information you get just from failing in the task.

As a trainer, you should try to think of the job from the learner's point of view. Sometimes corrective feedback can make use of intrinsic feedback that the learner may not realise is important. This is the secret of what some people call the 'knack', and it is learned by trial and error. Your job is to reduce the trail and error period by focusing on the feedback which is intrinsic to the task and which learners can use for themselves (feedback is dealt with in greater detail in Section 1.3).

◊ *Training glass blowers is not easy, because the trainer cannot know how hard the learner is blowing. Buckingham Glass set up a new training scheme based on intrinsic feedback. The learners blew into a pressure gauge until they could feel what the correct pressure felt like in their lungs. Armed with that information they could then practice on real glass, knowing for themselves which it should feel like.*

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WORKPLACE ACTIVITY 1

This Workplace Activity focuses on coaching a reproductive task.Select a situation at work where you either have to give some coaching, or are observing another trainer coaching.

Use the performance checklist below to give or receive feedback on the coaching. If you are doing the coaching ask a colleague to observe you. The performance should be rated on a scale of 1 to 4, where:

1 – the item was not done;

2 – the item was covered, but improvement is needed;

3 - the item was well covered, and only minor improvement is needed;

4 – the item was well covered.

Circle the appropriate mark for each aspect of the coaching.

1. Did the instructor gain the attention of the trainee?	1	2	3	4
2. Was the entry behaviour and previous experience checked?	1	3	3	4
3. Were the reason/s for learning the task explained?	1	2	3	4
4. Was the instructional procedure explained?	1	2	3	4
5. Did the instructor demonstrate the task?	1	2	3	4
6. Was each step of the task clearly explained?	1	2	3	4
7. Did the instructor emphasise the senses used for the task?	1	2	3	4
8. Did the trainee appear to understand the instructions?	1	2	3	4
9. Was the pace of the instruction adjusted to suit the trainee?	1	2	3	4
10. Did the trainee have an opportunity to practice?	1	2	3	4
11. Was the trainee asked to explain his or her actions?	1	2	3	4
12. Did the instructor making supportive comments?	1	2	3	4
13. Were the main points of the task summarised?	1	2	3	4
14. Was the assessment appropriate?	1	2	3	4
15. Did the instructor provide a satisfactory conclusion?	1	2	3	4

Demonstrations

Demonstrations are really a part of coaching, in that the first thing to be done when explaining most tasks is to demonstrate the final task (using the target time if it is appropriate to the job).

Demonstrations need to be practiced in advance. Most technical trainers have long experience in the job which they are coaching, but this is not always the case. There is also a potential problem for experienced workers who become instructors: they are so skilled at performing the task that they can overlook the fact that the purpose of the demonstration is to help others to learn it.

Practical issues which you should bear in mind when demonstrating include:

- the learners must be in a good position to see all the skilled movements that the job may require;

- you should point out in your commentary any small aspects of the task that may not be evident to the observing learners;

- some skills cannot be performed slowly (eg. plastering) so in this case you will either need to video the movement so that you can show it in slow motion or find some way of breaking down the task.

Some tasks require the instructor or demonstrator to acquire new skills just to demonstrate the task. One instructor in a mechanical workshop had perfected the skill of operating a lathe from the wrong side, so that the learners could stand in front of the lathe and see it working as an operator would.

In many tasks that involve mechanical or manipulative skills, experienced operators may not be able to describe how they perform the task: they just 'do it'. This is where the trainer has to analyse the task in great detail in order to break it down to prepare a coaching plan for learners.

In this situation, the operator should demonstrate the individual sub-skills repeatedly until the learner can perform them adequately. The learner should then be asked to 'assemble' the skills in sequence to perform the task in full.

The following Cameos show the importance of breaking down a task before demonstrating it for coaching purposes.

◊ *Some visiting Japanese managers doubted the need for task analysis on their course on the grounds that a skilled performer could teach others. The trainer gave one of them two pencils, and asked him to pick them up as if they were chopsticks. This was done in a trice. 'Now do it slowly so I can copy you,' said the trainer. The visiting manager could not do it slowly – the skill had become a habit. They stayed on for the course on task analysis.*

Glass blowers in Buckingham Glass have to acquire the skill of glass blowing while the glass is cooling, but the glass very quickly becomes too cool to blow and you have to start again. One instructor found a plastic resin which behaved like molten glass, but never set. This allowed the trainees to practice blowing so that when they used real glass they had already mastered one sub-skill.

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WORKPLACE ACTIVITY 2

Select a task in your workplace that is usually taught by demonstration. Review it critically to see if you can identify a better way of presenting the learning opportunity to the trainees. (Beware of the skilled performer who simply says, 'it takes years of practice'. It probably did, but only because training was inadequate!)

Lectures and presentations

The Institute of Management once did a survey to find out what people most disliked about their job. Top of the list by far was having to give a presentation. Usually this was associated with nervousness and lack of confidence.

As a trainer you will be presenting or lecturing to groups. If you are used to presenting it can be hard to see why some people get so nervous, but even an experienced presenter will tell you that a little nervousness is a good thing: it increases your concentration and stops you getting blasé about the task.

Presentations and lectures are particularly effective for knowledge-based subjects with a large group of learners. Preparation is particularly important here.

Giving a good learning presentation depends on three factors:

- controlling yourself;
- controlling your material;
- controlling the group.

We will look at each of these in turn.

Controlling yourself

The main issue here is one of confidence, and that comes from two sources:

- knowing that you have prepared properly and practiced sufficiently;
- knowing what to practice.

◊ Robert Cohen, a well-know cellist, was asked when he found the time to practice. 'Oh, in the aeroplane usually,' he replied. 'With a cello?' asked the interviewer. 'Oh no, I just sit back in the seat, close my eyes and go through everything I am going to do when I get on stage. I think through every aspect of the performance, not just the music; it's the performance that people have come to hear.'

'Oh no, I just sit back in the seat, close my eyes and go through everything I am going to do when I get on stage. I think through every aspect of the performance, not just the music; it's the performance that people have come to hear.'

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In the same way as the cellist, your presentation is not just words to remember, it is a performance. You need to practice:

- what you will say so you don't need to refer to your notes too often;
- where and how you will stand;
- using the OHP (or 35 mm) projector;
- how many steps you will take to the flipchart and when you will use it;
- when you will pause for questions;
- when you will sit (usually for the OHP) and when you will stand;
- when you will walk about, or walk towards the group;

and so on. These are all the elements of the performance of the presentation.

If you are giving a lecture or a presentation in a venue you do not know well, go there for a rehearsal. Make sure that you know where the plugs are, where you will stand, what the sightlines are for the group and how much space you have to walk about if you want to. If you prefer to use a lectern, (which makes it all look very formal) make sure that you know where it is, and whether it is the right height for you.

If you are not used to standing in front of a group, swallow your pride and (when no one is looking) practice in front of a full-length mirror. Ask yourself the following questions.

- Am I standing bolt upright?

- Do I stand with one hand in my pocket?

- Do I put all my weight on one hip?

- Do I cross my ankles over?

You need to stand in a stable and business like way – not rigid, but purposeful – so:

- take a deep breath, let it out slowly and stand evenly balanced;
- take a step forward or backward occasionally, and use your arms (not just your hands) to emphasise the key points you want to make.

For a lecture you are in the spotlight and you have to accept it; but remember that presenters rarely look as nervous as they feel. Ask someone to video you and you will see that this is true.

You should practice using the visual aids you will be using. Know where the switch is on the OHP, and make sure the OHP is focused and fills the screen. If you are not sure, or have not been able to set it up for yourself, it is better to try it out once before you start to fiddle with it during the session.

Have all your slides (if using them) ready, in the right order, and know where you will put them when you take them off the projector. Always place the next slide ready on the OHP when you take the last one off. This allows you to show the slide when you need it, and not have to fumble for it and interrupt your flow.

Do the same with the flipchart. Are you tall enough to pull the pages over the top? If not, or if you find this awkward, practice pulling one corner of the page over the top and down the back. Do you have tables on the side of the pages you want to turn to? (It saves fumbling for them.) Have you got prepared pencilled diagrams on the right pages? This saves you panicking as you try and draw while all eyes are on you.

Getting all these practical points right is where confidence is born. If you do get them right, you know that all will run smoothly. Most nervous presenters destroy their own confidence by not preparing these practical matters, and then getting flustered because they are not ready. To fail to prepare is to prepare to fail.

(We will be discussing the 'physical props' of training, such as projectors and flipcharts, in Part 2.)

Controlling your material

For any lesson, lecture or presentation it is important to prepare and structure your material and to produce a lesson or lecture plan.

Brainstorm all the ideas you can think of, and then ruthlessly prune them down to the minimum needed to achieve your purpose for the lecture. This is where you have to cut with confidence.

Plan your material so that it follows a logical sequence *from the learner's point of view*. This is important; if you lose the learners at the beginning they will either interrupt with lots of disorientating questions, or their eyes will glaze over with that look which strikes fear into any trainer's heart.

ACTIVITY 2
A chemist giving a lecture on corrosion might describe it as a process that starts with the exchange of ions from the metallic atoms in an aqueous solution, which in the presence of oxygen causes the….Are you following this so far? If you were giving this lecture as a training session, how would you start?

Obviously, there are a number of ways in which you could start but the general starting point should be the learner's experience. 'Have you noticed how your car rusts under the wing but rarely on the roof? Well, this is because mud sticks to the wing. The mud is damp and that allows the metal to…' See the difference?

◊   *A college lecturer noticed that one of the students was starting to doze off at the back of the class. She asked the person next to them to give them a diplomatic nudge to wake them up, but got the reply: 'You put him to sleep. You wake him up.'*

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ACTIVITY 3
Below are a number of sentences describing the process of getting a mortgage. Imagine you have to give a lecture to a group of school leavers, and number the boxes beside each sentence to show the order you think most appropriate. The building society will in effect own part of your house. ☐ You will have to show how much you earn. ☐ They will want to survey the house to make sure of its value. ☐ They will lend you the money if you earn enough to pay the instalments. ☐ When you want to buy a house you will need to borrow money. ☐ If you can't afford the payments, they may want to sell the house to get their money back. ☐ Money you borrow from a building society is called a mortgage. ☐ They will also want proof that the house is worth what you are paying for it. ☐

You may have chosen a different order from us, but our suggestion is as follows.

1. When you want to buy a house you will need to borrow money.

2. Money you borrow from a building society is called a mortgage.

3. They will lend you the money if you earn enough to pay the instalments.

4. You will have to show how much you earn.

5. The building society will in effect own part of your house.

6. If you can't afford the payments, they may want to sell the house and get their money back.

7. They will also want proof that the house is worth what you are paying for it.

8. They will want to survey the house to make sure of its value.

Notice that if you were training the staff of a building society, as opposed to explaining to a group of school leavers who might one day want to own their own homes, you might choose a different order to reflect the different point of view. You would probably start with:

- If you (they) can't afford the payments, we may want to sell the house to get our money back.

This emphasises the fact that you need to structure your presentation on the learners' requirements.

When you have prepared the main body of the lecture or lesson, write out your notes on small cards. Just write the key words for each topic. Avoid writing out a speech (it will sound contrived, like written not spoken language). This allows you to refer to your notes without being tied to a table, and also allows you to skip less important areas if time is running short. If you have written out long lecture notes it will be very difficult to prune it as you go. Controlling timing is the hardest part of presenting at first, and having your subject broken down into topics on small cards is the best way to control your material.

Controlling the group

Keeping your audience or learning group interested is really about focusing on what they want to know, as has been emphasised in the above activity. This means you will have to start with an effective introduction which points out that the content of the lecture is in their interests, even if they may not be wildly interested in it.

You can think of your introduction as being like a railway engine backing up to a row of carriages; you have to nudge them to let them know you are there, and take the trouble to connect with them before your set off. Your introduction should cover:

I	interest: some interesting fact to gain attention;
N	need: why they need to know about the subject;
T	timing: how long you will take, and what the time will be spent on;
R	response: how they can participate and when they can ask questions:
O	objective: what the purpose of the training is.

The introduction does not need to be in that order, but INTRO is a neat way to ensure that you connect with your learning group at the start.

In the Japanese language there is only one word for both 'guest' and 'customer'. Since the two are treated in the same way why have different words for them? In the same way, think of your learning group as your guests. You are the host and in charge of the practical arrangements, and your job is mainly to organise the information in a way that makes it easy for your guests to appreciate it.