

DESIGNING TRAINING

A Practical Guide



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1. Introduction

Designing training is a core skill of good trainers, yet it is one that is not often given proper attention. When learning to be a trainer almost all development is focussed on delivery skills, and design is somehow expected to be 'picked up'.

Many experienced trainers may also feel that, because they know their subject and are good 'on their feet', spending time on design is largely unnecessary and can be kept to a minimum. Good training can only be achieved if proper thought, time and effort have been put into the design of the training, and that thought and effort is recorded.

Quality design goes beyond producing a few slides, half a dozen handouts and a few scribbled trainer notes. Quality design results in a well-structured programme, utilising multi-media and a wide range of brain-friendly learning methods. It results in a robust programme that is built on useful delegate materials, detailed trainer notes and bespoke activities, as well as appropriate pre- and post-course work to aid the transfer of learning.

Giving proper consideration to design means that the training is likely to be better targeted towards the individual and business needs, and aid the effective transfer of learning to the workplace. This is the ultimate goal of training after all!

Some trainers who are brilliant at bringing pre-prepared materials to life may struggle when presented with a blank piece of paper and asked to produce something from scratch. It is not always easy to put your ideas down on paper.

This e-book aims to help those with some training experience to design quality training by taking a structured approach. It follows a logical, step-by-step method, and suggests what should be considered at each stage. Although it is written from the perspective of designing face-to-face training, most of the principles apply equally well to other forms of learning design.

2. Research

It may be a bit of a cliché, but it's vital to start with the end in mind. What are the desired **outcomes** or **benefits** of the training? Take it back even further, is training the right intervention to achieve the outcomes required? Something has triggered the request for training and this has to be investigated. Sometimes, problems (perceived or otherwise) may be solved by clarifying or standardising procedures, or re-organising work for example. It is vital to conduct research to identify whether training really is the answer.

Conducting a Training Needs Analysis

In the real world, the scale of the Training Needs Analysis (TNA) will vary. However, before beginning the design process, it is vital that some form of TNA is conducted. Without it, you have no idea if your training will actually work.

Essentially, a TNA is 'GAP' analysis, where you:

- identify the ideal state (i.e. what the organisation/manager WANTS people to do)
- identify the current state (i.e. what is happening now)
- specify the differences between the two (clearly and in specific terms)
- identify which gaps can be addressed by training (and which need to be addressed by other means).

Let's take a look at each stage in a little more detail.

1. Identify the ideal state

To identify the ideal state, you should investigate a number of avenues. Firstly, the people who spotted the need should be spoken to. What triggered them to consider training? Maybe it was feedback from colleagues or customers? Maybe KPIs or other results are below what they should be? Maybe there are going to be fundamental changes to peoples' jobs, or even to the industry? Maybe it's just a 'feeling' within the department? Understanding the background to the request is vital if you are to design the training within the context of the wider business environment.

The next stage is to familiarise yourself with best practice, or any standards that are relevant to the situation. If there are no standards, should some be created? What do other departments/organisations do? Look inside and outside the immediate environment for answers so that you have the widest range of examples to draw upon.

Make sure that you can describe the ideal state in specific terms, and challenge any vague language. Encourage stakeholders to identify specific measures, and to focus on positive outcomes rather than negative ones.

For example, “We want to improve sales by 5%” or “we want our employee survey results to go from 60% satisfied with communication to 80%”. If you cannot quantify the outcomes, they can still be measurable. For example “We need all of our advisors to be able to provide basic information on all of our products, and advise on stock levels”, or “We need to adopt a consistent approach to handling complaints across all sites”.

2. Identify the current state

Again, it is important to speak to various stakeholders about the current situation. Ask for specific examples and evidence. Not only will this help you to understand the training needs more, but it can provide useful scenarios to include in examples or case studies later on.

Use probing questions to challenge any assumptions or generalisations, and speak to more than one person. If you take the word of one person alone, your training is likely to be biased, or not deal with the whole situation. Using focus groups can be a great approach here if you can gather sufficient people at the same time.

Speak to the people actually doing the job. Look at the situation through their eyes, and if possible, work alongside them for a time. What difficulties do they face? What differences exist in terms of approach? What is their ideal outcome? Taking time to understand their point of view benefits you in a number of ways: You get to know them – the language they use, what they like/dislike, the knowledge they already have etc; You can begin to see what is a training need and what is not; You find out reasons behind actions, and so can build this into your solution; and you get a new perspective on things.

Training that bears no resemblance to the organisation’s reality will fail.

Finally, you should identify what already exists to help people do what is expected of them. What procedures manuals are there? What guidelines are available on the intranet? What expertise already exists within the group? You may be able to use some of these valuable resources in your solution.

3. Specify the differences

Having looked at the ideal and the current situation, it should be quite easy to identify where there are discrepancies. It is then important to recommend how each of these discrepancies should be dealt with (not all will be best dealt with through training). Identify:

- What people aren’t doing (but should be)
- What they are doing (but shouldn’t be)
- Where there is inconsistency or confusion

Focus on knowledge and behaviour as much as possible. Attitude and motivation may be relevant, but it is unlikely the root cause of problems in these areas will be clear.

4. Identify what can be addressed by training

Discuss your findings and recommendations with the sponsor of the training. Be clear about what you can address through training, and what things need to be addressed in other ways (e.g. maybe the computer software is out of date, or the procedures manual needs updating). Agree some measurable objectives with the sponsor(s) that the training can be evaluated against at a later date.

At this stage it also important (especially for external consultants) to specify any dependencies or assumptions. For example, you may agree your objectives on the assumption that you will be provided with 12 sample customer records, or a copy of the software package that is used.

Be as clear as you can as early as you can about who will do what, when, why, and the benefits it will bring.

Finally, you need to discuss **practical issues**. There is no point designing a wonderful 3-day event if the client/manager can only release people for a day. Find out what restrictions there are on times, locations, resources, technology and budget. Ask if they would like a senior manager to sponsor development programmes, what technology is available, and where and when people could attend live events, etc. If you are designing a more flexible or blended solution, find out when and where people will be undertaking the training, what technology they will have access to, how it will be recorded and so on.

So, in summary...



2. Content

The most important thing to do when deciding on the content is to remember that the training is for your audience and their sponsors – not for you! It can be tempting to include your favourite topic (some trainers will include subjects like NLP or assertiveness in everything they run), but unless it is relevant to the objectives/outcomes agreed during research, it is irrelevant.

So how DO you decide what to include?

Brainstorm

Even if you are working alone, you can still brainstorm all of the possible **topics** that you could include in the training, based on the **needs** identified by your research. Use a flipchart, whiteboard, roll of wallpaper or a pack of post-it notes to quickly jot down all possibilities.

To brainstorm effectively, you should:

- Write all suggestions down – using a Mind Map is a great way to capture thought processes as well as suggestions.
- Don't criticize or evaluate ideas at this stage.
- Encourage creative thought.
- Involve others if possible. Get everyone to contribute and develop ideas, including the quietest members of the group.
- Keep the atmosphere informal – let people walk about, doodle, talk over one another if it helps them to come up with ideas.
- Avoid the temptation to move into 'solution mode' with an idea that seems particularly promising. If it doesn't work out in the end, you have no alternatives to consider.
- Encourage people to develop other people's ideas, or to use other ideas to create new ones.
- Ask questions to build on ideas such as 'what else?' 'how could?' and 'what if?' to stretch thinking.
- Write down ALL ideas that come out of the session. A good way of doing this is to use a flip chart. This should be studied and evaluated after the session.
- Use colours and pictures. Don't limit your record to one piece of flipchart paper – cover the room if necessary.

Rank

Then review all your ideas in relation to the objectives. Rank each possible topic as A, B or C where:

A = Very important – will certainly help to achieve the objectives

B = Useful – may help to achieve the agreed objectives

C = Interesting – related to the agreed objectives

D = Not relevant with hindsight.

Clearly, at this stage you should discard anything that is categorised 'D', and place things in category 'C' to one side for a while.

Explore

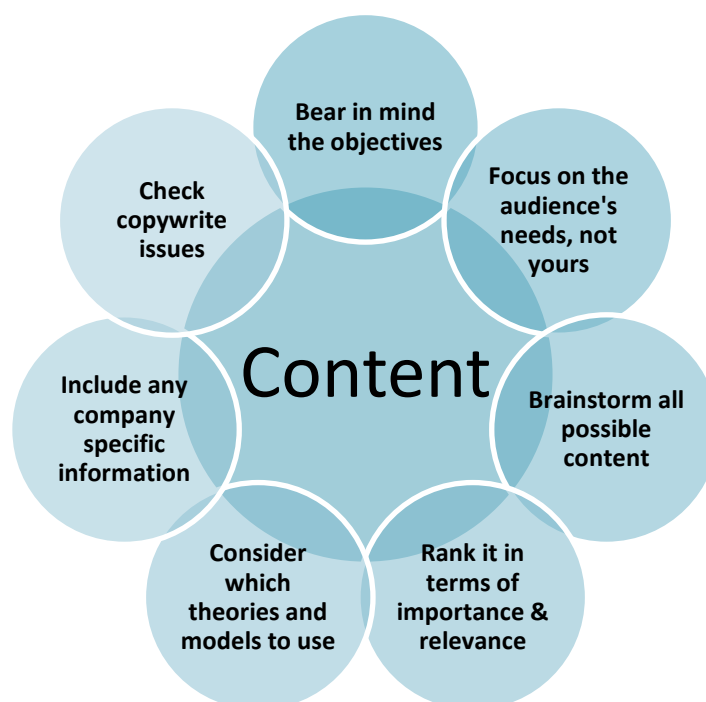
For each of the topics categorised A and B, you need to delve down into more detail. Consider what theories and models will be used, what procedures/standards should be highlighted and what examples should be used. Check that you have permission to use any theories/models as some them are copywrite.

Refer to existing sources of information (e.g. competence models or e-learning modules) where appropriate. Not only does this help to reduce time and costs associated with design, but it also makes the training more integral to the wider business practice.

Consider what the target audience is likely to be receptive to, taking into account their current knowledge, experience, expectations, and cultural issues (corporate and more general).

Finally, remember to include anything that the sponsor specifically has asked to be covered.

So, in summary...



3. Structure

Remember that training is not just about the 'event' itself. To aid the transfer of learning it is important to prepare the ground properly, provide the right sort of intervention at the right time and in the right way, and then follow it up. By structuring learning in a logical way, it is easier for the delegates to learn.

Of course, some training doesn't need a live event. A self-guided development programme may be sufficient in some cases, so those completing the learning simply need a route through and access to all the resources available. If stand-alone materials need to be created for this format, there's still much to take into account, and using MASTER (see later) works for stand-alone materials as much as facilitated events.

Before the Event

It is important to manage people's expectations about the training, and provide a context for the learning.

If people are prepared to learn, they are more likely to learn.

It is also important to consider whether delegates all need to have a certain 'base level' of knowledge or skill before attending the event/completing the learning. If people do not have this base level, then either:

- time has to be spent bringing people up to date with things in order for them to participate, which takes away valuable time from the intended content, or;
- those delegates cannot gain value from attending, or fully participate in the event, meaning it may be a waste of time for them.

Asking people to complete some pre-course work is valuable at so many levels.

- It makes sure that everyone completing the training all have a common starting point, and certain assumptions can reasonably be made during the training.
- It helps to get delegates into the right mindset for learning, and introduces some key topics.
- It can save time during the training event, potentially reducing the length of an event, which has implications for costs and disruption to operations.
- It can help to link the learning to the working environment and so aid the transfer of learning.

So what format should pre-course work take?

The simple answer is, almost anything, as long as it is relevant to the content and will help the learners to get more value from the event. Common things to include in pre-course work are:

- Questionnaires (to save time during the event, and allow more time on interpretation/discussion)
- Case studies (for similar reasons)
- Reading (if people need to have read the latest policy documents for example)
- Collation of information (to talk about real-life examples on the event)
- Identification of personal objectives (to focus the mind)

Whatever form it takes, the most important thing to bear in mind that the task is something that will **add value** to the event, and can be **completed alone**, with no further guidance.

At the very least, individuals should discuss their reasons for attending a learning event with their manager (or coach/mentor) so that relevant conversations can be held after the event, and support is available for putting learning into practice.

The Event Itself

Having already decided (more or less) on the content, the next stage is to structure it, and make it fit together in the best possible way.

A great way to do this is to transfer all of your contents onto post-it notes. Highlight main or critical topics by using different colours. Then spend time moving them around in terms of order, grouping similar or complimentary aspects together. Duplicate topics if you like if they could fit in more than one place. When you finalise the design, they will naturally fall into one place or the other. Make sure that all essential topics are included and at this stage, you can go back to the 'interesting' topics (category C) you identified earlier, and see if any of these would add value.

Another way that can be useful is to mindmap the event. Start with the title in the middle of the diagram, and then from this, identify the main topics. Then from each of these, branch out the specific models, theories or ideas that would be included. You can quickly see potential links and overlaps, and you may find that some ideas fit better under headings other than the one you first thought of.

It is important that the flow is logical and natural. Make sure that your event will not cover the same thing 3 times in 3 different places (although of course referring back to previous points is good and reinforces important matters).

Whatever method you use, transfer your basic structure into a flowchart or more linear format, and then allocate approximate timings, again referring back to the agreed objectives. Check that you are giving each objective sufficient time.

Accelerated Learning - MASTER

Before going on to select specific methods of delivery for each element, check that (overall) the proposed structure is as follows:



MINDSET

- Start with a context or 'big picture'
- Give learners the opportunity to identify the benefits they will get from completing the learning
- Make sure you gain and retain interest



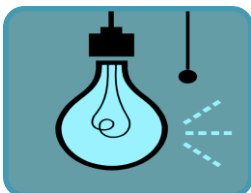
ACQUIRE THE FACTS

- Provide new information, or present existing knowledge/skills in a new light
- Include models, theories and examples - make sure learners are educated



SEARCH FOR THE MEANING

- Provide opportunities for the information presented to be discussed and explored
- Build on ideas and concepts already introduced
- Give learners the opportunity to learn from their own and others' experience



TRIGGER THE MEMORY

- Include elements that summarise key learning points in a memorable way



EXHIBIT THE LEARNING

- Make sure that learners have the opportunity to practice new skills and test new knowledge
- They should be able to leave the event being able to do something that they couldn't before

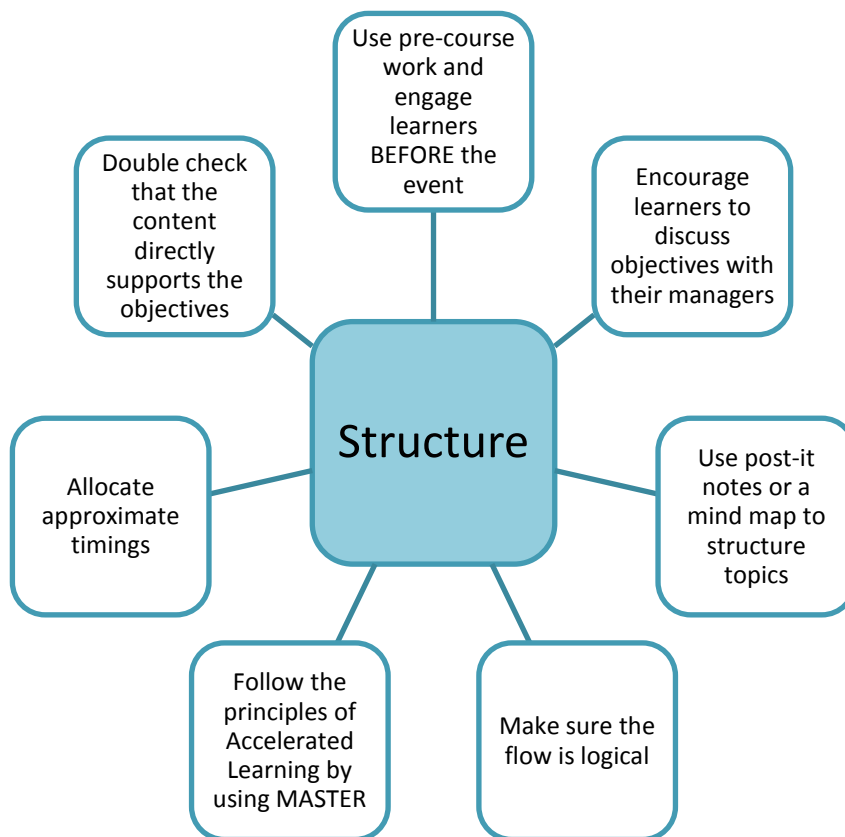


REFLECT

- Build in time at the end for group and personal reflection
- Make sure learners are able to see how they will apply what they have learned when they return to work

Within the event itself, you are likely to move up and down the MASTER model to some extent. For example, you may introduce a topic (Acquire the facts) then explore it through case studies (Search for the meaning) before completing a group exercise (Trigger the memory), and THEN introduce another topic. As long as the event itself follows broadly in this order, it should feel natural to the learners.

So, in summary...



4. Methods

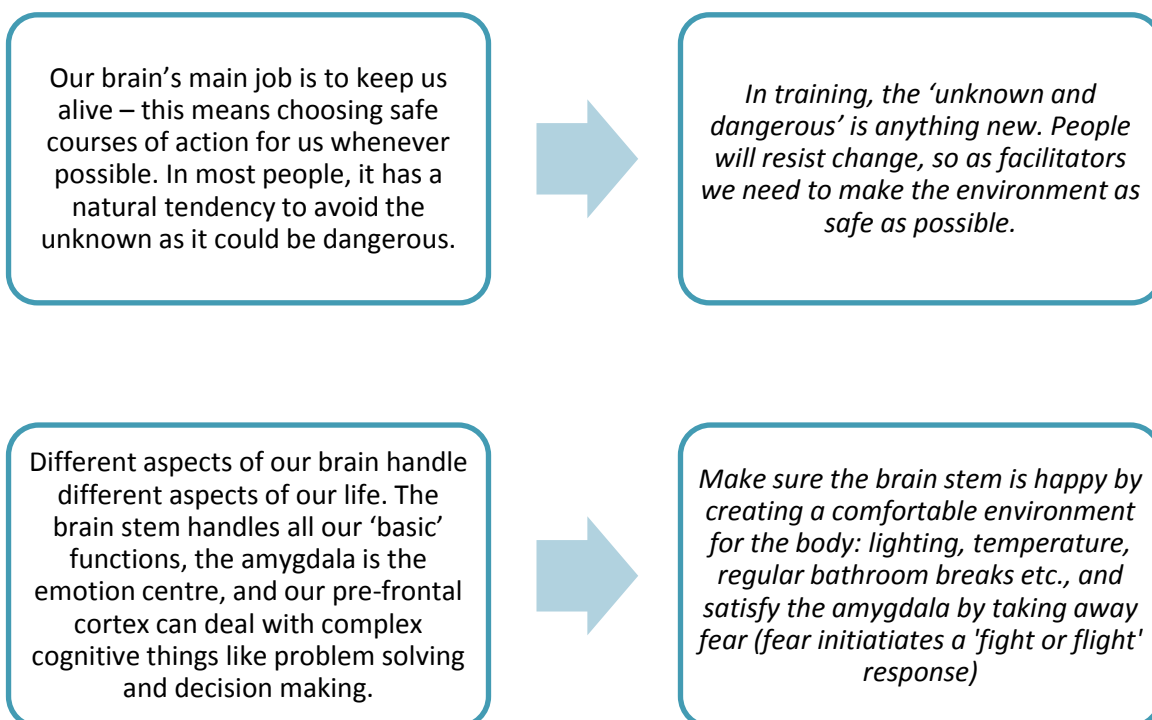
Having agreed the basic content and structure, the next stage is to decide HOW each of the topics will be covered. The nature of the event, the specific objectives and the make up of the intended audience will all have a bearing on how the topics are delivered. If the learning event is about gaining new skills, then there should be lots of time built in for practice. If the event is about gaining knowledge, then it follows that more time should be given to exploration of facts and testing understanding.

Whatever the focus of the learning (unless the learning event is very short), it is important to use a variety of methods.

Although Learning Styles are currently being called into question, but research from neuroscience is supporting the fact that we need to use a variety of styles to engage the brain and accelerate learning.

Neuroscience in Learning

Whether designing or delivering learning events, some of the key principles you ought to be aware of include...



Our brain has three main centres – The brain stem, the amygdala (caveman/ reptilian brain) is where we feel emotion and triggers 'gut reaction' which is often in conflict with our more rational pre-frontal cortex.



People often respond emotionally to change or challenge (criticism). Once they've had time to think, they may react differently. Give people time to reflect and think.

Our brain likes routine – It likes to make clear neural pathways that can be followed without conscious effort. Practice and repetition create these pathways, and this will free up the 'thinking' part of the brain for more complex issues. Where possible, the brain simplifies things as much as possible.



Give clear instructions, use processes and keep repeating key messages.

Our brain likes what is known and familiar. It looks for patterns, tries to make things fit what is already known and may reject what doesn't. Therefore, we tend to distort information, generalise it or even 'delete' it if it doesn't fit our existing view of the world.



Make links to what is already known. Emphasise what's similar rather than what's different.

Our brain is plastic – that is, it continues to change and develop throughout our entire lives. It is possible to 're-wire' your brain, but as you get older it is harder because we have more deeply ingrained neural pathways that are more difficult to over-write.



Recognise that some people may struggle to change their ways even if they really do try. Provide as many ways as possible to try new things, emphasise progress, and keep going!

Neural pathways are built more quickly if an action or experience is repeated often and/or if information is presented to the brain in a variety of formats i.e. through more than one of our senses.



Involve people in learning and engage as many senses as possible: if they see, hear and feel/do they are more likely to remember. Covering the same information in different ways and from different perspectives is also useful.

The brain only pays attention to (and therefore remembers) what it decides is useful or interesting (grabs its attention), or what we consciously tell it to. There is simply too much to process otherwise.



Make sure the benefit of the training is clear (or the negative consequences of NOT doing something). Make it interesting and capture people's curiosity at the start.

Our brain (like any other organ in our body) works best when it is healthy, well nourished, hydrated and rested.



Pay attention to energy levels. Don't work through lunch or schedule training at the end of a day/shift, and ensure people have lots of water to drink.

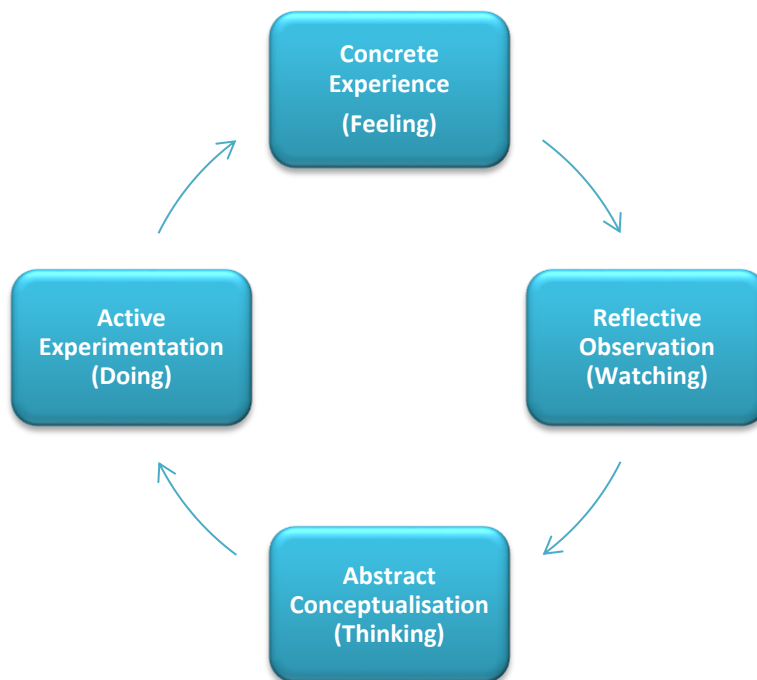
The brain works best in a state of calm alertness: Too stressed and it can't focus; too relaxed and it doesn't pay attention. Similarly, if there's too much going on in the form of mental or physical distractions, the brain can't concentrate. On a similar note, a typical attention span is expected to be between 5 and 20 minutes: The actual length depends on the person's interest in what they are focussing on, and the extent to which they are distracted.



Take time to relax people and settle them in. Manage their expectations about what will be covered, how, why and when. Remove distractions such as mobile phones and tablets/laptops. Build in regular breaks OR changes of activity.

Kolb's Learning Cycle

Even though some people are disputing traditional learning theories, Kolb's learning cycle still offers good advice when structuring an event. David Kolb suggests in his theory (which is still generally accepted) that learners must move through a cycle of experiential learning if that learning is going to 'stick'. The cycle is shown below.



There are four stages in learning which follow from each other: Concrete Experience is followed by Reflection on that experience on a personal basis. This should then be followed by an examination of those reflections, and acquisition of facts/theories to understand things more (Abstract Conceptualisation), which is then followed by action planning for the future/next experience (Active Experimentation). This of course leads to the next Concrete Experience, and so the cycle continues. All this may happen in a flash, or over days, weeks or months, depending on the topic, and there may be a "wheels within wheels" process at the same time.

This cycle has clear implications for selecting the methods of delivery, but it should also be taken into account when structuring the event. If you don't give each topic sufficient attention, and make sure that each builds on the previous topic, you are unlikely to complete the cycle, and much of the potential learning will be lost.

Learning Styles: Honey and Mumford

Most people are familiar with Kolb's Learning cycle, and Honey and Mumford learning styles, which have links to the learning cycle.



Activists

- Enjoy the 'active experimentation' part of the learning cycle.
- They learn well from 'having a go' and trying things out of curiosity. They are likely to lose interest in anything slow-paced or passive.
- They tend to respond well to activities, role plays, games and making presentations.



Reflectors

- Enjoy the 'reflective observation' part of the learning cycle.
- They learn well from watching others, thinking things through, listening to experts and opinions. They like time to think, and will find it difficult to learn if they are rushed.
- They tend to respond well to watching presentations, group discussions and watching demonstrations/films.



Theorists

- Enjoy the 'abstract conceptualisation' part of the learning cycle.
- They learn well from logic, understanding first principles, and like proof. They enjoy finding things out, and are comfortable with processes and procedures.
- They tend to respond well to flowcharts, diagrams, processes, listening to experts and completing (validated) questionnaires.



Pragmatists

- Enjoy the 'active experimentation' part of the learning cycle.
- They are practical people, and like to try things out to find out what works best. They respond well to problem solving and decision making, and lose interest in anything that is not clearly applicable.
- They tend to enjoy case studies, problem-solving exercises, simulations and project work.

VAK

The VAK learning styles model has its origins in Neuro-Linguistic Programming. It suggests that most people can be considered to have one of three preferred styles of learning. These three styles are as follows, (and there is no right or wrong learning style).



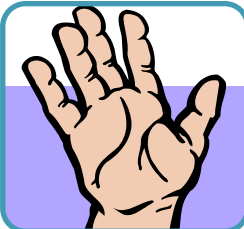
Visual

- Someone with a Visual learning style has a preference for seen or observed things, including pictures, diagrams, demonstrations, displays, handouts, films, flip-chart, etc.
- These people will prefer to perform a new task after reading the instructions or watching someone else do it first. These are the people who will work from lists and written directions and instructions.



Auditory

- Someone with an Auditory learning style has a preference for the transfer of information through listening: to the spoken word, of self or others, of sounds and noises.
- These people will prefer to perform a new task after listening to instructions from an expert, or discussing the best way with someone. These are the people who are happy being given spoken instructions over the telephone, and can remember all the words to songs that they hear!



Kinaesthetic

- Someone with a Kinaesthetic learning style has a preference for physical experience - touching, feeling, holding, doing, practical hands-on experiences.
- These people will prefer to perform a new task by going ahead and trying it out, learning as they go. These are the people who like to experiment, be hands-on, and never look at the instructions first!

People commonly have a main preferred learning style, but this will be part of a blend of all three. Some people have a very strong preference; other people have a more even mixture of two or less commonly, three styles.

Just as some individuals have a preference for one learning style, so some learning activities are strongly geared to one style of learning.

Where the individual's preference and the activity to which they are exposed involve the same style, they are likely to be engaged in learning. If there is a mismatch they may need to make more effort. Therefore, it is important that any training you design takes different learning styles into account and has something for everyone.

It is tempting to make decisions about training materials, and how you would run a course based on your preferred style.

Remember that the most important person in the room is the learner, not the trainer.

As such, it is good practice to provide 2 or 3 alternatives for running each part of the workshop (that will each achieve the learning objectives). This allows the trainer to select the method that is most appropriate for the specific group that is attending the workshop that day.

Accelerated Learning

Accelerated Learning is the term used for 'brain-friendly' way of training people quickly AND so that learning sticks. It is a principle that brings together key points from neuroscience and learning theory that encourages working WITH the brain and our natural tendencies, rather than against them.

Accelerated Learning unlocks much of our potential for learning that tends to be untapped by traditional teaching methods. It does this by actively involving the whole person, using physical activity, creativity, music, images, colour, and other methods designed to get people deeply involved in their own learning. It also recognises that people learn in different ways, at different rates and that we do not all have the same abilities and preferences.

There are a number of core principles of accelerated learning that you ought to be familiar with:

1. **Learning Involves the Whole Mind and Body.** Learning is not all merely "head" learning and rational thought: Knowing is not the same as believing or doing. Make learning personal, emotional and sensory as well as logical. This way it is more likely to be remembered and acted upon.
2. **Desire Drives Learning** – when people feel that learning something will benefit them, they are much more inspired to get involved. Exploring 'what's in it for me' (WIIFM) helps to get learners in the right frame of mind.
3. **Provide a Context.** Helping people to understand the 'big picture' before going into detail helps them to position things in their mind. It can also help to deflect lots of questions about why the training is being run.
4. **Learning is Creation, Not Consumption.** Knowledge is not something a learner absorbs, but something a learner creates i.e. learning should be ACTIVE not passive. When people learn for themselves, they create their own neural networks, understand more and are more committed to applying that learning.

5. **Build on Existing Knowledge.** Recognise and use the knowledge and experience in the room. Give people credit for what they already know and can do, and use this as a starting point. There's little point in starting from scratch when you don't need to. It isn't motivating and lengthens the learning unnecessarily.
6. **Collaboration Aids Learning.** All good learning has a social base. We often learn more by interacting with peers than we learn by any other means. Competition between learners slows learning. Cooperation among learners speeds it up. A genuine learning community is always better for learning than a collection of isolated individuals.
7. **Learning Takes Place on Many Levels Simultaneously.** Learning is not a matter of absorbing one little thing at a time in linear fashion, but absorbing many things at once. Good learning engages people on many levels simultaneously and engages multiple senses at once.
8. **Learning Comes from Application (With Feedback).** People learn best in context. Things learned in isolation are hard to remember and soon forgotten. We learn how to swim by swimming, how to manage by managing, how to sing by singing, and how to sell by selling. The real and the concrete are far better teachers than the hypothetical and the abstract.
9. **Positive Emotions Greatly Improve Learning.** Feelings determine both the quality and quantity of one's learning. Negative feelings inhibit learning. Positive feelings accelerate it. Learning that is stressful, painful, and dreary can't compare with learning that is joyful, relaxed, and engaging. Focussing on the Positive i.e. what people should do, what they do well is far more effective than drawing attention to the negative (what they shouldn't do, what they are doing wrong).
10. **A picture paints a thousand words.** The human nervous system is more of an image processor than a word processor. Concrete images are much easier to grasp and retain than written or verbal information.
11. **Create Hooks to Hang the Learning On.** Using mnemonics, acronyms, stories, mind-maps and other tools to make the training easy to recall help the learners greatly.
12. **Create a Learning Environment that encourages curiosity, openness and support.** The room should be set up with the delegates in mind as much as possible, It's not about you showcasing your skills, but about the delegates being able to learn.

Practical Considerations

It may seem obvious, but you need to consider the physical constraints that may affect the learning. If you are planning a workshop with lots of break-out discussions, is there actually a second room that you can use? If planning to use a DVD, will there be a DVD player and screen available? If planning e-learning, do all delegates have access to the right sort of equipment?

Will the equipment be provided by the venue, or will the trainers have to take it with them? Again, this is relevant as if the trainer is arriving by train, there is only so much equipment that they can carry. In these cases, your workshop needs to be as 'lightweight' as possible in terms of resources.

You cannot ignore these factors, so find out as much as possible before you get too far into the design. If you aren't sure, or if the training will be delivered in different places so some will have certain facilities whilst others won't, build in alternatives and optional sessions.

For example, if you are designing a programme on performance reviews, you may wish to include a YouTube video that illustrates all the main points very well. However, you know that in 3 of the venues, you will not be able to show it. To overcome this, write in an alternative session where delegates work in groups to agree good/bad characteristics of performance reviews, or review a case study. This has the added benefit of providing a fall-back position if the video doesn't work in sessions where you are planning to use it.

Visual Aids and Take-Away Materials

It is inevitable when considering methods that you consider what visual aids to use. NEVER design your event around PowerPoint slides.

Slides (if they are necessary at all) should SUPPORT your event, not drive it.

Yes, many people like to have something to look at (especially 'visual' people), but this does not have to be slides. You can have posters around the room, make great use of flipcharts, whiteboards and smartboards, and use delegate workbooks and handouts.

If you ask delegates for their ideas about something, and then show them your pre-prepared slide, some people may feel that the discussion was a waste of time. However, if you have a discussion, create a 'best practice' list together and then put it on display, more people will feel that they have achieved something AND are more likely to take ownership of the learning.

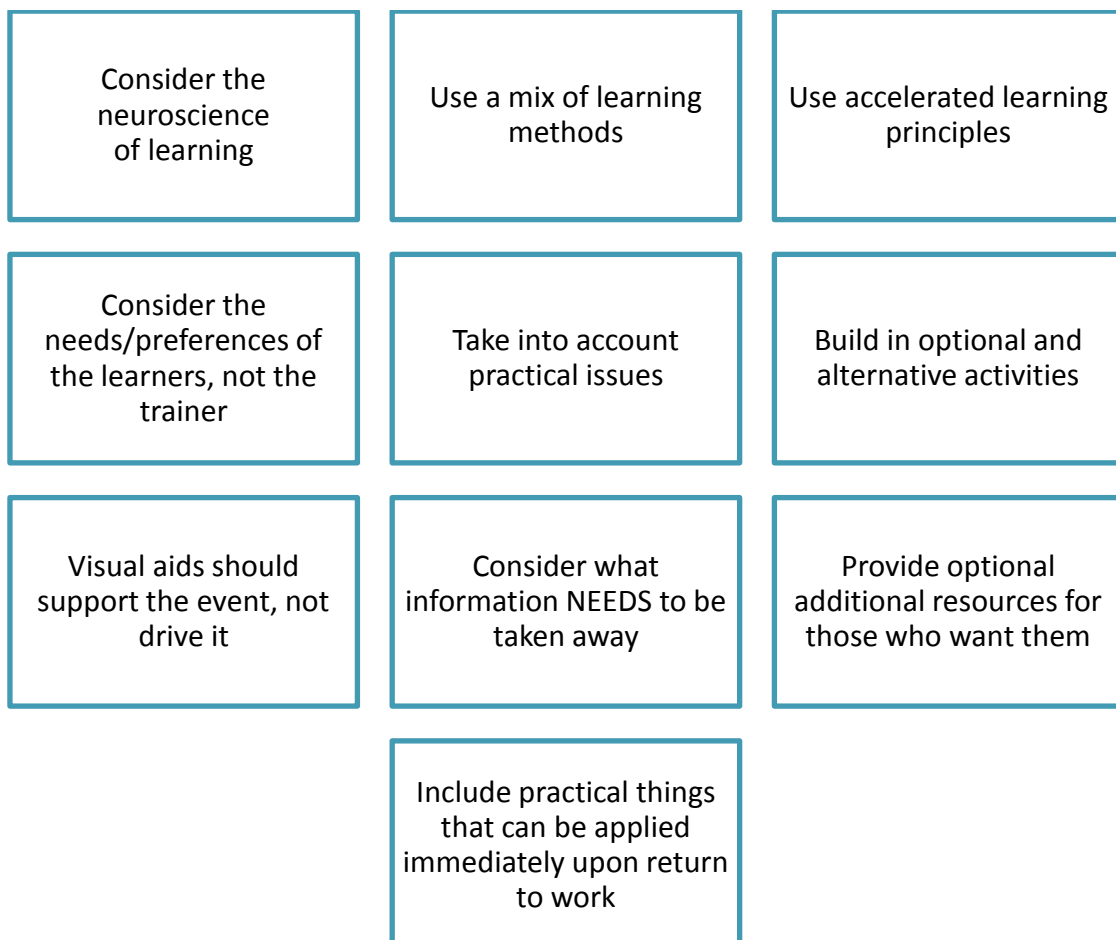
It is also important to consider what learners will take away or access after the event when they return to work. You don't want people focussing so much on taking down information that they cannot fully engage with the learning. On the other hand, you don't want people to leave with so much information that they don't know where to find the bits that they need.

Identify early on which are the crucial pieces of information that you want everyone to take away, and decide on the best format for this information. You can always offer additional materials (handouts, reading lists, copies of slides etc) to those who want it.

Follow Up

Finally, be very clear before you begin to actually write the training, how learners will apply the learning, and how success can be measured. Make sure that you have built in opportunities for them to practice and provide specific, practical things that they can do immediately that they return to work.

So, in summary...



5. Write!

Many trainers spend very little time on actually writing the learning event. It's true that the planning stage is now complete, but the programme is not actually written. At the very least (live) learning events should have:

- Joining Instructions for delegates
- A complete trainer's guide/session plan (not just a few bullet points)
- Delegate materials (for learners to use during the event and take away)
- Supporting documentation (activity handouts, visual aids etc)

Joining Instructions

Joining instructions help to manage learner's expectations and prepare them for the event. They will include all practical arrangements such as start and finish times, location, arrangements for lunch and so on. They will outline any pre-course activities/reading that needs to be completed. Sometimes additional information such as a list of delegates may be included so that people can travel together if an event is off-site.

Good joining instructions take away peoples fears and answer their questions.

Great joining instructions excite people about your event.

For virtual or self-directed events, people need to know how to access the learning and (if applicable) how much time they need to set aside, and if they need any specific programmes or equipment.

Trainer's Guide

Even if you are writing for self-delivery, you should always produce a proper trainer's guide, which includes an equipment and materials list. It is tempting for trainers not to bother with this. They have planned the event; they know what they are going to do; a 1-page overview is sufficient right? Wrong!

Writing a proper trainer's guide or session plan has so many benefits.

- It finalises and crystallises thinking. It is only when you come to write the detail that you spot missed opportunities, or realise that you need to research a particular topic in a little more depth.
- It allows you to get buy-in/approval for your programme by circulating it to stakeholders in advance.
- It simplifies preparation before running an event as there is only one document to read.
- You have to rely on your memory less – names of procedures/related documents are included, so you never forget to mention related things at the right time.
- It enables someone else to pick up the training and deliver it if necessary.
- It signposts what supporting materials/visual aids go with which topic.
- It provides a record of what was covered if there are questions in the future, or requests for extra events.

Trainers notes should include timings, key points to present to the group, instructions for activities, and key points for debrief/discussion. They should also indicate when supporting materials or visual aids should be used or referred to.

Many trainers resist working from such a detailed document feeling that it is restrictive. However, once you are familiar with it, you can create your own short-hand version, and other trainers are likely to do the same. If you have built in optional and alternative sessions, it need not be restrictive. Trainer's Guides should never be designed as scripts to be read aloud. Each trainer should be able to inject their own personality and experience to an event.

Think of the trainer's guide as the structure of a house. Every house on a new development has the same shape. They are all constructed the same. However, they are all decorated and furnished differently to make them meet the needs and tastes of the people living there. This is the relationship between the designer and the deliverer. The designer provides the structure and materials – the trainer brings them to life and makes the event their own around that structure, that meet the needs of the learners there on that day.

Delegate Materials

Delegate materials should be detailed and high quality. Badly photocopied handouts from different sources are not usually that useful, and look unprofessional. Producing a delegate workbook or handout pack that people can use during the event, and refer to afterwards is good practice. It means that delegates do not have to spend time writing things down, and can instead engage fully with the discussions/activities.

Handouts are useful if you expect the event to be very flexible and delegate-led. You can simply issue the appropriate handout at the right time. This provides a 'just-in-time' solution, and ensures that delegates get only what is relevant to them. Provide a folder or wallet for delegates to keep all their handouts together, and make sure that all handouts are typeset in the same style and branded appropriately.

A workbook is useful if there is a lot of information to provide (and perhaps if PowerPoint slides are not being used) as the trainer can dip in and out of it as required. It also means that delegates have ALL the content and can do extra reading of areas that were not covered in detail on the event. Increasingly, workbooks are provided as downloadable files so save on printing and making them more accessible to mobile workforces.

Copies of slides alone are not usually that useful after the event, as they shouldn't contain detailed information, but could be offered as an optional extra for people to take away if they wish.

Whatever form you choose, take time to create a style that is attractive, easy to read and clear. Employ a desk-top publisher if your own skills are not that great.

If materials do not look appealing, people will not be inspired to read them.

Supporting Material

Whether it is slides, posters, activity handouts or role-play briefs, your supporting materials should look professional and like they were designed especially for this event. Use the same colours and fonts throughout. Check slide animations/transitions work and are not distracting. Look at your posters from a distance and make sure that they are legible. Use graphics that are consistent with the topic and culture of the company. Little things like this can make a big difference to the way that your materials (and so learning event) are perceived.

So, in summary....



6. Review

Self Review

The first thing to do is to self-review. Check that the workshop flows, makes sense and that all cross-references are accurate. Make sure that all your objectives have been met.

Self-edit as much as possible. Check that you have not put too much content in for the time available, or included conflicting/unnecessary information. Are all handouts/activities/visual aids signposted? Will other trainers understand what you mean, or have you used your own 'shorthand'?

Refine your timings. Consider how long a discussion may take if there are 14 delegates instead of 8. Do the timings allow for this? Check that the content reflects the outcomes required by stakeholders, and has taken into account cultural/practical issues identified during the research phase.

Proof-read all the materials, looking for silly spelling/grammar errors (your PC will NOT identify everything) and check that you have been consistent with your terminology in all materials. Make sure that your fonts, line spacing and margins are consistent. Look at your headers and footers (if used) and make sure that they are all the same.

Peer Review

If possible, ask someone else to proof-read for you, as you rarely spot all errors yourself. Ask them to check that things make sense when they have no prior knowledge of the content. Discuss their feedback from both a delegate and trainer point of view. Is there anything you could do to enhance the event?

Stakeholder Review

Present the materials to the stakeholders for review, and ask for their feedback. If possible, present the event to them, demonstrating how supporting materials will be used, and how activities will be run to enhance the event. Many stakeholders are not trainers, and having you bring the event to life will really help them to get a feel for it.

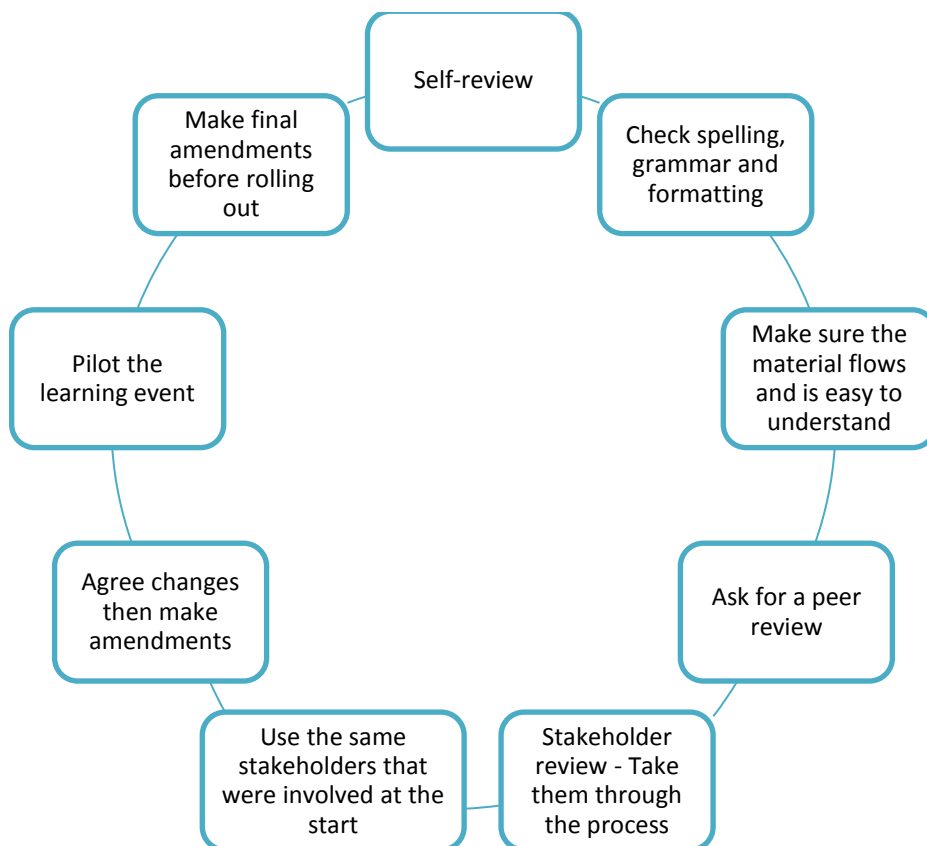
Take them through the process: What the initial need was, the key findings of the research completed, how you intend to meet the needs through training. Remember that they have probably not given much thought to the training for a while whereas you have been immersed in this for a long time!

Always ask the same stakeholders that were involved in the commissioning/research to review it. If you use a different person, they are likely to suggest fundamental changes that were not in your original brief.

Amendments

Make any amendments necessary before finalising the materials, and preparing to pilot the event. Agree a review after pilot event(s) and make any further amendments necessary before finalising the learning and rolling it out.

So, in summary...



Summary of the Design Process

Below is a summary of the key stages of effective design.

Research

- Carry out a TNA if possible. Otherwise, meet with stakeholders to discuss what is driving the need. Understand the background to the request.
- Identify the desired outcomes in as specific terms as possible. You can then evaluate the success of your programme more easily. Identify the specific changes in knowledge, skills and behaviour that are expected to be achieved as a result of the training.
- Profile the intended audience. Who are they? What is their existing level of knowledge and skills? What are their expectations? Is the training voluntary or compulsory? What will they respond well to?

Content

- Identify the subjects that need to be covered to meet the outcomes and objectives. Which of them are essential and which of them are desirable?
- Research and select the different theories and models to be included. Make sure you pay attention to copywrite issues, and check your sources to make sure that the information is correct and complete.
- Decide what internal information needs to be included. Are there any company specific policies or procedures that need to be covered? Is there a competence model or behavioural framework that needs to be reflected in the design?

Structure

- Decide what (if anything) delegates will need to do BEFORE attending the workshop to ensure that they get the most out of the learning. Is there any reading, activities/questionnaires to complete or information they have to bring, for example?
- Organise your topics into a logical flow. Post-it notes can be useful here. Use two different colours to write down all of the MUST include topics, and NICE to include topics. Move the post-it notes around until you are happy that all of the MUST do topics are included, and identify any links and overlaps to make sure that the flow of the material is logical.
- Use MASTER to accelerate learning and make sure that learning flows in a brain-friendly way
- Assign approximate times based on the relative importance of each topic. Timings can be refined later.

Methods

- Having decided upon the topics to cover, you need to decide HOW they will be covered. Important topics need to be covered in depth using a variety of methods, whilst 'nice-to-do' topics can be covered in less detail.
- Make sure that the workshop is active, follows accelerated learning principles, and appeals to a number of different learning styles. A mix of styles not only helps different people to learn, but it keeps the workshop interesting and interactive.
- Take into account any audience preferences and practical restrictions to make sure that it will be possible to run the workshop as designed, and that delegates will want to participate.
- Consider the visual aids and activities that will support the event. Are visual aids needed at all?
- Finally, consider how delegates will be able to apply the learning, and how it will be followed up/measured.

Write

- Even if you are writing for self-delivery, you should always produce a trainers guide, a delegate workbook or pack, and equipment and materials list and joining instructions. Visual aids are often also produced as well as additional handouts.
- Trainers notes should include timings, key points to present to the group, detailed instructions for activities, and key points for debrief/discussion. They should also indicate when supporting materials or visual aids should be used or referred to.
- Joining instructions should be produced to manage delegates' expectations about what the workshop is about, the benefits they will receive from attending it, any pre-course activities that they need to complete, as well as practical arrangements about the place, time etc. of the workshop.
- Delegate materials should be detailed and high quality. Badly photocopied handouts from different sources are not usually that useful, and look unprofessional. Handouts or workbooks mean that delegates do not have to spend time writing things down, and can instead engage fully with the discussions/activities. Copies of slides alone are not usually that useful after the event.

Review

- The first thing to do is to self-review. Check that the workshop flows, makes sense and cross-references are accurate. Self-edit as much as possible. Check that you have not put too much content in, or included conflicting/unecessary information. Refine your timings. Check that the content reflects the outcomes required by stakeholders, and delivers the required objectives.
- Proof-read all the materials, and if possible, ask someone else to proof-read for you, as you rarely spot all errors yourself. Check that things make sense, and that there are no silly spelling or formatting errors.
- Present the materials to the stakeholders for review, and ask for their feedback.
- Make any amendments necessary before finalising the materials, and preparing to pilot the workshop.