How to Design Effective Training
That Transfers to the Workplace

20 Practical Tips to ensure your Training adds Value to the Bottom Line

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Introduction

Training and in particular, LIVE training, is under increasingly pressure to prove its worth. Designing training that meets a business need, that people want to do AND is easily transferable to the workplace takes knowledge, expertise and time. For people to transfer learning to the workplace there needs to be a clear correlation between what they learn during training, and their everyday role.

Designing training is fundamental to effective L&D, yet it's one aspect that is often overlooked. Lots of attention is given to the research, the tech (or platform) and delivery skills, yet design is just somehow expected to happen. Great design is essential if any intervention is to succeed.

Quality design is not about slick slides or quirky exercises. Quality training design of live or blended programmes is about creating well-structured events, utilising multi-media and a wide range of brain-friendly learning methods. This results in a robust programme that is built on a clear structure, a varied approach, 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 more likely to meet individual and business needs. Improving competence or confidence in a current role, or developing them for the next, is the ultimate goal of training after all!

Here are my 20 tips for writing a bespoke training programme that will improve transfer of learning to the workplace.

1. **Check that training is the answer.** Obvious, but vital. Many days and weeks have been lost in organisations up and down the land creating training when training wasn't needed. Sometimes all that's needed to improve performance is a simpler procedure, a clarification of expectations or better performance management. Training is appropriate when people need to develop their knowledge, skills and/or attitude.

2. **Involve as many different stakeholders as possible in the research phase.**
   Not only will this help to make sure that you have a rounded understanding of what's required (rather than a biased one) but when people are consulted at the start, they form a connection with what you are creating. As such, they are more likely to support it and commit to it. Commitment is critical to transfer of learning.

3. **Clarify the objectives and outcomes.** You cannot hope to write a bespoke course if you don't know what it is your client or stakeholders are trying to achieve. Get them to define it in specific terms and explain what that looks like in THEIR part of the business. Even if you are designing an internal course, 'great service' will look, sound and feel very different in the contact centre to the accounts department.

4. **Link to Values, Competences and Business Priorities.** Transferrable training is in-line with the business culture and priorities. One of the problems with open courses is that the core messages or advice may be contradictory to that of your organisation. At the start of the design process, map the desired outcomes to the Values, Competency Frameworks and Business priorities of the organisation. Highlight which ones the outcomes support, raise concerns about any that contradict, and make these links in your training so that you can 'join the dots' for delegates.

5. **Brainstorm all possible content that will meet these objectives**. I tend to create many mind maps and litter my desk with Post-it notes before finally settling on the content that will best meet the objectives. At this stage don't worry about what you already know/have. Focus on 'chunks' of content where possible but sometimes you need to include very specific things to make sure that they don't get lost. Sometimes the little things are what make the biggest difference. I once wrote a 'handling complaints' workshop for an industrial paints supplier. The key stakeholder kept coming back to 'The Magic Minute' which in the end was just 10 minutes of the workshop, but it was the CRUCIAL 10 minutes that acted as the hook to hang everything else on.

6. **Sort and rationalise the content.** You will no doubt have lots of potential content. DO NOT be tempted to cram it all in! Overloading people with content is one of the best ways to guarantee that learning WON'T be transferred to the workplace, because real learning won't have occurred in the first place. Instead, consider what can be combined, what's essential, what's nice to have and what can be dropped. Now is a good time to ear-mark certain content for pre and post-course learning. What can (and should) people read, watch or do before they attend the event? What extra learning can they do afterwards if they want to?

7. **Identify pre-course work or stand-alone resources.** Blended learning solutions allow content to be covered more flexibly. This reduces the time needed in 'formal' training which helps keep costs down, makes it easier for people to complete and (generally) gets managers on board as there will be less disruption to everyday operations. As a rule, include as much information giving as pre-course or stand-alone work. People don't need to be taken off the job and listen to a presentation: they can watch, read or listen at a time that suits them AND the business.

8. **See what tried and tested source material you have and can include.** This is where you start to flesh out the detail. I never look at what I've already got until the content is clear in my mind. If you start looking at existing material before this point it is too easy to drift away from the original specification and start trying to make what you already have fit what is wanted. Don't limit your search to training material: internal handbooks or policies and procedures can be used if they are relevant. Don't reinvent the wheel if you don't have to, AND referring to existing material helps to demonstrate relevance to the business. Then, look at the gaps and work out what new content needs to be researched and developed.
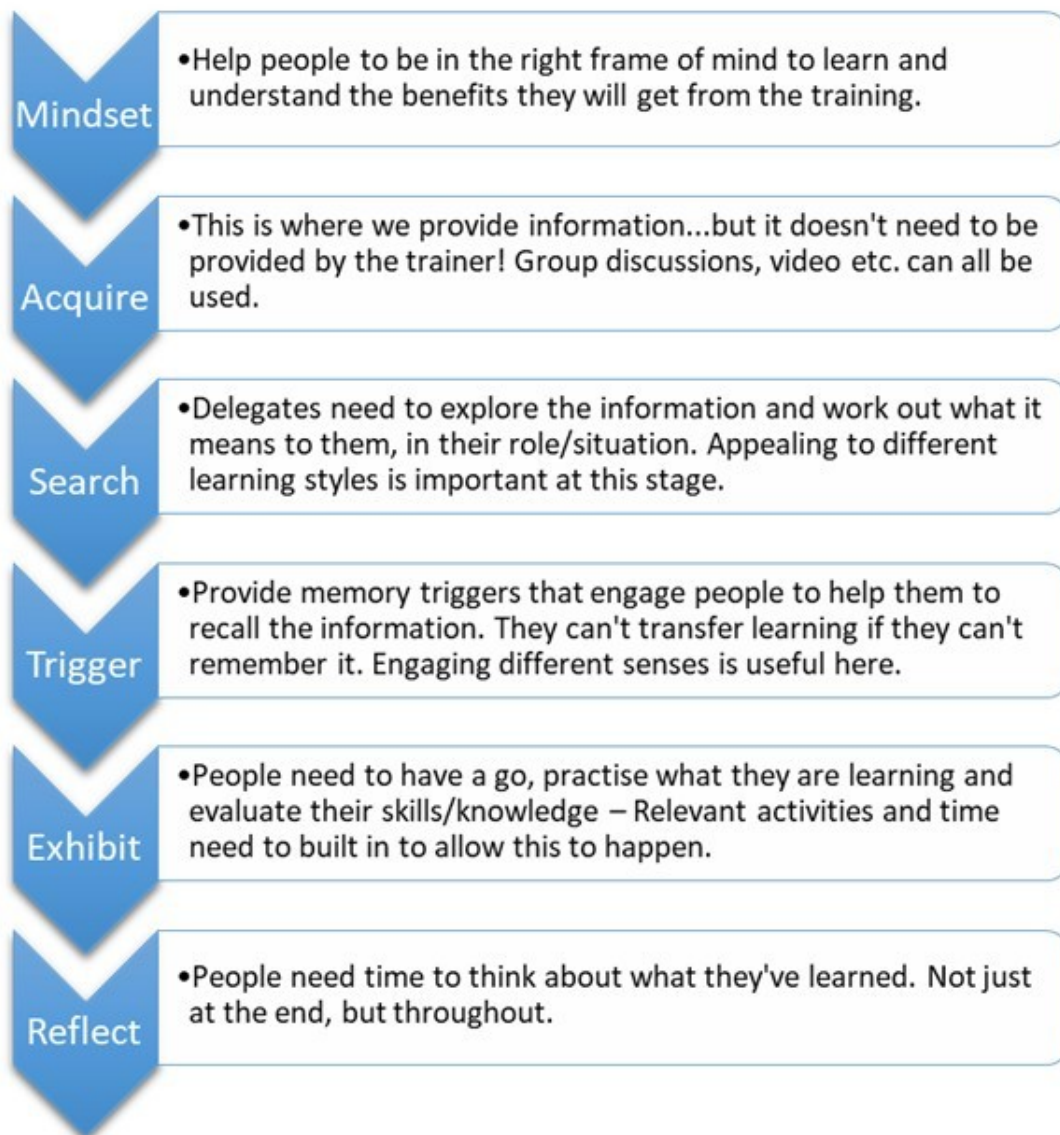
9. **Consider different methods.** Although face-to-face learning is still the most effective in most cases (we learn best when we are emotionally and socially engaged), it isn't always necessary or possible. Therefore give thought to how each part could be delivered: e-learning? Podcast? Video? Article? Self-reflection? There is a time and a place for different learning approaches, so keep an open mind.

10. **Decide what will go into a Workshop.** This tends to be the content where people need to learn practically or would benefit from learning socially. Workshops should be active – we learn by doing, so those aspects of the content that need to be explored through discussion or practice should be covered in a workshop whenever this is possible.

11. **Structure this content appropriately.** Firstly, decide the logical order of the content. For example, in a customer service workshop you might look at understanding customer needs; then recognising why things go wrong; then how to handle angry or upset customers to take delegates on a journey.

12. **Create an outline.** This allows you sense-check your thoughts and make sure that your content is appropriate to the stated objectives. It's also a great time to get feedback from key stakeholders before diving into detailed design, and potentially wasting a lot of time.

13. **Add relevant timings.** Timings reflect the emphasis that needs to be put on various elements, to make sure that the course has its focus in the right place. There really is no point in spending 90 minutes covering the reasons why people complain and how it impacts the business if people already know this. Yes, it's important to provide context, but perhaps this can be provided pre-course so the training event itself can get straight to the main issue e.g. reducing complaints and the cost of them. It's also important to set aside enough time throughout for personal reflection and action planning. Allowing just 5 minutes before the end is not going to result in meaningful action plans.

14. **Make it easy to digest.** There is a MASSIVE difference between truly learning and simply understanding. When we learn we 'get it', we believe it, we can do it, and more importantly we WANT to do it. To help people to do things differently, we need them to DO – not listen and nod in the right places. People learn best by doing – when they are socially and emotionally engaged. Building in brain-friendly learning activities that encourage people to learn for themselves and in a practical way massively improves transfer of learning. A few well-chosen and well facilitated activities will have a far bigger impact on learning and its transfer than a comprehensive deck of PowerPoint slides.

15. **Use MASTER to accelerate learning:** This accelerated learning model helps to make sure that the learning is designed in a brain-friendly way and make is easier for people to engage with, gain real insight and remember what they have learned. This in turn means they are more likely to apply it when they get back to work.

Mindset
- Help people to be in the right frame of mind to learn and understand the benefits they will get from the training.

Acquire
- This is where we provide information...but it doesn't need to be provided by the trainer! Group discussions, video etc. can all be used.

Search
- Delegates need to explore the information and work out what it means to them, in their role/situation. Appealing to different learning styles is important at this stage.

Trigger
- Provide memory triggers that engage people to help them to recall the information. They can't transfer learning if they can't remember it. Engaging different senses is useful here.

Exhibit
- People need to have a go, practise what they are learning and evaluate their skills/knowledge – Relevant activities and time need to built in to allow this to happen.

Reflect
- People need time to think about what they've learned. Not just at the end, but throughout.

16. **Include a variety of learning methods**. Although there is now some scepticism about different learning styles, mixing up the delivery style is important. It keeps people engaged and provides lots of different 'entry points' to the learning. Using the same method over and over is boring – for the facilitator as well as the delegates! They won't apply what they don't remember and they won't remember it if everything felt the same.

17. **Create Measurable Action Points.** Whilst it is very important that people create their own action plans (as they will be more committed to them), including some observable measurable outcomes can be very helpful. Specific action points help people to see exactly how they can apply the learning to their role, and will often act as 'quick wins' that start the process of applying learning. They also provide something specific for managers and stakeholders to look out for as an indication that learning is being applied.

18. **Write the Trainer's Guide.** For me, this is the heart of the designed programme. This is where all the content sits. I usually write for other trainers to deliver (either associates or my clients' internal team) and it's VITAL that they know exactly what they need to do: which points to bring out, the way to set up and de-brief activities so that the right sort of learning points are made. A detailed Trainer's Guide takes the guess work out of delivery and gives the original stakeholders confidence that the things discussed at the research phase are going to be covered. It's also incredibly important if the facilitator doesn't know the details of the day-to-day job of the delegates. Including specific examples that are meaningful to delegates helps them to understand and learn. You aren't talking about something generic – you are talking about something very specific, which they can immediately identify with.

19. **Create the supporting materials**. Visual aids should be VISUAL and support the training, not drive it. Pictures and diagrams are much more memorable than a bullet-pointed list, and slides (if used at all) should be used as a prompt for the trainer or to catch the attention of the delegates. I always create a set of posters that are visual but have key messages on that can be scattered around the training room too.

The Delegate Workbook (if required) can be detailed so your slides don't need to be. Few delegates read detailed workbooks, but for those who do, having all the information in one place is very helpful. Offering it as a downloadable resource after the event is a nice way of encouraging delegates to be present and active during the event AND prompting them to reflect on learning after the event.

Case studies and role plays need to be written to reflect their language, their environment and their reality. Writing detailed case studies is one of the most pleasurable things about creating bespoke training and a very effective way to aid transfer of learning. Bringing characters to life with back stories, and supplementing this with realistic objective data ALWAYS gets people involved in the learning, and provides a direct link to their day job.

Pre and Post-Course Work needs to be relevant and something that people can do alone. Experience tells me that some people will do pre-course work, and others won't. Therefore, I tend to make it something that will help those who DO complete it, but doesn't prevent those who don't from getting involved. Reading articles, watching videos (that can be discussed in the workshop), doing a bit of self-analysis or research (that can be fed into other activities) are good forms of pre-course work. Creating the right sort of pre-course work can also help create the right 'mindset', and good post-course work aids 'Reflect'.

Create a Supporting Equipment and Materials List so that the trainer doesn't have read every word to find out what they need or how many of each handout they need to prepare. Links to specific resources and equipment need to be clear in the Trainer's Guide, but having one page that clearly lists everything that will be needed takes a lot of stress out of the preparation.

20. **Present back to Stakeholders for approval.** Going back to the stakeholders to share what you've created and highlight how it meets THEIR stated needs is an important step in raising the profile of the training and getting commitment for your programme. It doesn't matter how well your training is designed, if managers are other key stakeholders in the business aren't behind it, its impact will be minimal.

Other Important Factors to Consider

Although good bespoke design is one of the most important factors in ensuring that learning from training is transferred to the workplace, it isn't the only thing that has an impact. The best designed workshops in the world will still only have limited impact unless:

- **The training is launched and communicated properly**. Too many internal programmes are just slipped onto the intranet or explained in an email. People have too many emails. They don't look on the intranet. There needs to be a real buzz about the programme, so L&D teams need to make it desirable and actively market it.
- **People WANT to participate in the training**. They know why they are attending and how they will benefit. People who are 'sent' on a course (or even worse, just attend because a colleague pulled out) are unlikely to get value from it or put anything into practice.
- **The facilitator is capable of engaging delegates and delivering brain-friendly, interactive training**. Your technical expert may have the best knowledge, but this doesn't mean they are the best person to do the training! For specialist courses, using an experienced facilitator to run the event with the specialist acting as an internal expert (there to explain specific things and answer queries) is often the most effective thing to do.
- **There is accountability and follow up**. Who asks if action plans have been completed? Who provides coaching support? Who is sharing the successes of people who have completed the training? What is the process for follow up?
- **The delegates are supported by their manager before and after the event.** Managers who take a real interest in what their team have covered, and help them to implement their action plans, are far more likely to see a return on investment than those who don't.

Consider the Sad Tale of Del the Delegate…

At the end of the course, Del is full of euphoria, his head is spinning like a top. He is dizzy with new ideas and full of enthusiasm to apply his new learning. Del returns to work on Monday morning. He finds that it is also spinning. It is rotating slowly but surely in the opposite direction to his own new spin.

His mates tell him that he has got to be joking when he tells them of his new plans, and his boss reminds him that he will be hard-pushed to meet his performance targets if he goes ahead with his new ideas (and of course, his performance targets are linked to his pay, and he has already lost 2 days by attending the course!)

The friction set up between Del and his company undermines his enthusiasm and exhausts all of his energy. Del's behaviour reverts to what is (and always was) reinforced by his manager and the company. His spin stops and then adjusts itself to move in the same direction as everyone else's.

Del feels older and wiser. He won't get caught out like that again. He always knew that those trainers were out of touch with the real world.

(Originally Published in People Management sometime in the last Century!)

Great training that transfers to the workplace and so makes a difference to the organisation isn't just thrown together. It's very carefully researched, designed and supported.

I hope that you found this useful.

Sheridan Webb – Founder: The Training Designer's Club.

About Me

As an independent Training Designer, I've spent the last 20 years focusing on the research and design of bespoke training programmes, and bite-size workshops.

In 2019 I decided to share my expertise by creating the Training Designer's Club. The free Facebook group is a casual discussion forum open to anyone involved in training design. Our VIP members get more resources, support and value by having access to a resources library, regular virtual meetings (Designer Drop-Ins) to discuss their own design challenges and on-going development via webinars, lunch and learn sessions and on-line courses (charges may apply).

Find out more: www.trainingdesignersclub.co.uk