A Practical Guide To

Designing Great Training

Training Designer's Club

Contents

Training Designer's Club

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 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!

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 translate what's in your head so that someone else can bring it to life. Even if you only ever design for yourself, robust design will reduce your preparation time if it has been a while between sessions. It will also give your clients/stakeholders confidence in what you are going to do. "Trust me, I'm a Trainer" doesn't cut it anymore.

This e-book has been designed for the Training Designer's Club. It 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. You can find out more about the Training Designer's Club at the end.

It's not a theoretical book, so you won't find lots of references to academic papers. Theories can be useful, but I want to get straight to the point and focus on practicalities. That said, I don't suggest that my way is the only way that works. Designing training is a mixture of science and art, and we all do it slightly differently. I simply aim to share how I do it (you can use this as a starting point and then adapt the approach to suit yourself, your organisation and your topic), and help you to avoid making so many of the mistakes that I have seen over the years.

The vast majority of this book is dedicated to designing a great training event: It doesn't spend long considering the role of training in an organisation, or defining L&D strategy, weighing up the pros and cons and different types of development, managing stakeholders or marketing and managing training events. These things will be touched upon, but I'm guessing that the reason you've chosen this book is that you've done your research and decided that a live training workshop, or blended course is the right approach.

Having said that, I am going to back up a little before I get into the practical stuff, because there are a number of important things that need to be considered BEFORE you start creating your event.

So, in this guide, I cover…

1. Initial Consultancy - Is training the answer?
2. Training Needs Analysis – What are we trying to achieve?
3. Research – How do we get from A to B?
4. Transfer of Learning – Is your organisation ready?
5. Stakeholders – Who are they and what do they want?
6. Aims and Objectives – What will people be able to do after completing the training?
7. Content Scoping – What will we cover, and what should we leave out?
8. Blend – What will be in the learning mix?
9. Structuring an Event – How do you decide a structure that flows?
10. Methods – How can you bring your content to life in a way that is meaningful and will stick?
11. Variety – How can you adapt your training to suit different people and different circumstances?
12. Practicalities – How can you make sure your event will work no matter who delivers it, where or when?
13. Materials – What materials do you need and in what format?
14. Write (or Create)! – How can you create materials that gain and retain attention?
15. Review – What should you do to get your training event approved?
16. Learning Evaluation – How will you demonstrate that your training has worked?
17. Pilot – Why should you pilot, and what should you focus on?
18. Launch – How can you create some excitement about your event and get people signed up to attend/complete it?

1. *Initial Consultancy*

Is Training The Answer?

Often, learning specialists are called upon to create training to address a specific (real or perceived) shortfall in skills or standards.

It's nice to be needed, so there is a danger that we leap to the aid of the manager or department (or organisation) without first double checking that:

a) The 'problem' is real
b) It isn't temporary (and will therefore resolve itself soon enough)
c) Training is the best way to address the issue.

Is it Real?

Sometimes, we have a knee-jerk reaction to something, or (especially when things happen unexpectedly) see the problem as being much bigger than it is:

- A sudden and temporary change brings about confusion and people may need time to adjust.

- An unusual situation puts people under pressure and no-one is quite sure of how best to handle it.

In these situations, it's normal for people to feel confused and unsupported. It's also perfectly understandable if not everything runs like clockwork – people are working out what to do as they do it. Unlike 'business as usual' no-one is in the habits and routines that make normal circumstances so easy to handle. The things we must think about are:

- How likely is this situation to happen again? Is it actually something we can predict and plan for?

- What are the negative consequences associated with being unprepared for this in the future?

- How well the people actually performed, rather than how well they FEEL they performed. Coming out of our comfort zone and having to deal with the unexpected is difficult and stressful, but if people rose to the challenge (and that challenge is unlikely to occur again) training after the event won't add value.

Other times, people have unrealistic expectations of themselves. They expect perfection when good enough is good enough. Someone with a few months' experience may be comparing themselves to someone with many years behind them. In this case, it's not likely to be training that will make the difference, but experience and practice. Sometimes that polish and flexibility can only be gained through many of years of doing the job.

Is it Temporary?

Any change causes disruption. It can knock our confidence and cause a short-term dip in our knowledge, skills or performance. The good thing is that most (small) changes don't need training: They MAY need instruction and they need time for people to change habits, but training would be like using a sledgehammer to crack a nut…and by the time the training had been designed and delivered, it would be too late anyway – people would have adapted.

A simple example would be the installation of a new photocopier. The sequence needed to programme colour double-sided copies may be quite different to the old one. However, a step-by-step set of instructions, alongside being prepared for people to have to start again (and probably curse) in the first couple of weeks is all that's needed. We don't need training in using the photocopier – we will work it out all by ourselves after a few uses, and by asking our colleagues.

Is it Necessary?

Sometimes, there is a genuine need and its unlikely to resolve itself. But that STILL doesn't mean that training is necessarily the answer. There are a number of reasons (apart from lack of training) that may explain why someone isn't able to do something as well as they ought. They include:

Lack of Clarity

- You'd be suprised how often people aren't actually told what they are supposed to do, and to what standard. Too many managers expect team members to mind read. Are managers communicating clearly and regularly about what's expected? Are they giving feedback to help people to do what's required?
- Out of date standards and expectations can also cause a problem. Managers don't always appreciate how things have changed over time and haven't realised that the theory no longer fits reality.
- Linked to this, is the issue of role modelling: Without true clarity, people tend to look around them and do what everyone else seems to be doing. What if there is a lack of consistency? What if the experienced (or influential) people in the department aren't good role models?

Lack of Resources

- Sometimes performance drops because people simply don't have the right tools or resources to do the job. This may include time, money and people. If people are trying to work with outdated equipment, systems, lack of support, or are simply short-staffed, training will not help.

Conflicting Priorities

- There's an old saying "What gets measured gets done" and if people are being asked to do one thing (or behave in a certain way), yet something else is what is rewarded, then they'll do the 'something else'. For example, you want your customer service advisers to solve customer's problems first time, yet target them on number of calls handled: they are going to focus on quantity, not quality. No amount of training will change that focus.

Lack of Motivation

- Sometimes people are capable of doing what is required to the right standard, but they still choose not to. Training is all about developing competence and confidence - if motivation is the problem, training will have a limited effect. You can lead a horse to water but you can't make it drink.

- Training departments are often asked to get involved so that managers can avoid performance managing their people. Of course, we must then question why the manager isn't able to do this...perhaps the REAL training need lies with the manager and not the team member?

Poor Processes

- Sometimes a lack of performance may be down to inefficient outdated working practices rather than the skills of the people doing the work. This is particularly true when systems have been modernised...new equipment often means that a number of things that were necessary in the past are no longer required...yet we still cling to them, over-complicating matters, creating more opportunities for things to go wrong and generally being inefficient.

Take time to talk, listen and observe to identify if training really will help. The worst thing a training professional can do is go along with a menu or ready-made solution (even if they are just in our mind) and try to make the situation fit an existing package, or twist things to justify a new pet project of our own.

It may mean that challenging managers or people senior to us. It may mean us having the guts to say “we can’t help”, but ultimately, providing training when it will do no good does more harm than good: We take people away from their jobs (which affects output and so the bottom line); we use our own time creating and delivering a solution (which has a cost attached); the training has limited (or no) effect (which affects our reputation).

So, before you dive into creating a training solution, double check that it will be worthwhile. Even the most brilliant training solution won’t have any impact if there wasn’t actually a training need there in the first place! If you want to learn more about alternatives to training, check out How Not to Waste Your Money on Training by Krystynna Gadd.

2. *Training Needs Analysis*

What are we trying to achieve?

Assuming that our initial consultancy satisfies us that training will indeed be helpful, we can't just dive in and start pulling a course or module together. We need to resist the urge to start creating and complete 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 clear outcomes to work towards or any way to measure the effectiveness of your training.

It can be tempting to miss this part out, especially if dealing with strong characters who may see your analysis as a challenge to their authority. However, if you explain that conducting a TNA will help to make sure that the solution meets their needs exactly, even the most belligerent of managers should understand.

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

- specify the problem that you need to solve
- 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. **Specify the problem that needs to be solved**

Training should solve a problem or bring a reward. Adults are far less interested in content (i.e. what they will learn) than they are in how their lives will be easier by completing the training. So, the first part of any TNA should be about truly understanding what problems people face at the moment, and the benefits they will get from solving them. Alternatively, it may be an opportunity that they need to take advantage of and experience a benefit as a result.

If we understand the issues from the 'users' perspective, this provides a focus point for all the rest of the research that we do. It helps to prevent scope creep and makes sure that any training we do design will be valuable to those completing it.

2. **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. Being 'better' at performance review conversations isn't helpful: Ask "What do you mean by better?" "What would people do more/less of?" "What would you hear people saying?" "What evidence would there be that a performance review conversation had been successful? 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%" or "we want everyone to have a meaningful one-to-one with their manager once a month".

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 everyone on all sites to follow our handling complaints procedure as specified".

3. 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 (anonymised and edited of course!).

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 enough people at the same time. Of course, this may be unnecessary, but for company-wide training or for training to support a high-profile initiative, they can add a lot of value.

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 or LMS? Is this information up to date? How is it accessed? What expertise already exists within the group? You may be able to use some of these valuable resources in your solution.

4. 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
- What changes are coming that people don't have the skills for?

Focus on knowledge and behaviour as much as possible. Attitude and motivation may be relevant and should be bought to the attention of the stakeholders but working on the assumption that training is about developing competence (knowledge and skills) and confidence, focus on this as much as possible.

5. 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 different teams are being asked to do different things, or the procedures manual needs updating). Following this, you will be able to agree measurable objectives with the sponsor(s) that the training can be evaluated against at a later date (see later).

6. Stay True

It is very tempting and easy to take all of this wonderful research and analysis and STILL create a programme that doesn't add value. Why? Because we generalise. It's not usually cost-effective or practical to offer personalised training. For example, a member of the Training Designer's Club had been tasked with writing a time management workshop. However, everyone's role was different. Time management WAS an issue, but those working in customer service had very different challenges to those working in IT. It became clear that instead of writing one 8-day workshop, it would be better to create four 2-hour workshops, covering specific challenges: Planning and Organising, Handling Interruptions, Beating Procrastination and Managing Monkeys. Of course, people could attend more than one, but it's unlikely they would need more than two. These more focused workshops can be supplemented by signposting useful resources and are more likely to solve the specific problems that people face.

So, in summary...

Specify the problem that needs to be solved	Identify the ideal outcome	Speak to sponsors and stakeholders	Identify standards
Research best practice	Identify current reality	Speak to the intended audience	Look for specific examples
Understand the culture and context	Clarify what is and what is not, a training need	Identify specific outcomes	Avoid generalising

3. Research

How do we get from A to B?

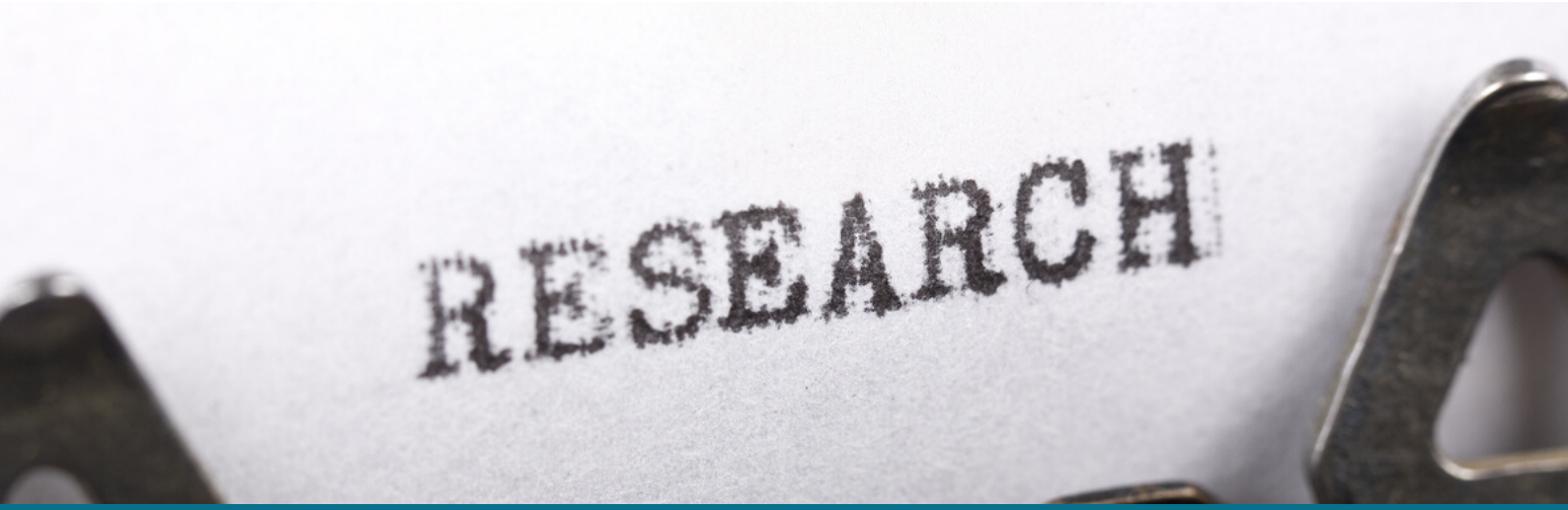
Research and Training Needs Analysis are often conducted together. They are separated here to allow us to focus on defining what the intended delegates and business need from the training (TNA), and identifying what you need to create the solution (Research).

The difference between focus of the TNA and this research is that the TNA is to establish WHAT we need to do. Research is more concerned with HOW.

This stage is particularly important for external consultants who will need to quickly get to grips with the organisation, culture and ways of working so that they can create a meaningful solution. Although still useful for internal L&D partners, much of the knowledge will already be in place – though it's still worthwhile checking assumptions: different departments/locations can all have their own idiosyncrasies which need to be understood.

The research phase is always fascinating – a little like peeling an onion, in that just as you think you've got to the bottom of something, another fascinating angle is discovered.

This is perhaps the one aspect where being an external consultant is easier than being internal: It's OK to ask the 'stupid' questions, because no-one expects you to know the answer. If you work internally, you may be worried about your own reputation if you ask too many questions or appear unfamiliar with certain aspects of the business.



But ask the stupid questions you must. And the complex, challenging and difficult ones.

At this stage, you are trying to get an accurate picture of how things are now – warts and all. You are trying to establish what has been done already, what resources people have access to, what the quality of those resources are like, what the informal procedure is, and what people like (and dislike). Any training solution must be grounded in the organisations reality… you can't just transplant a programme from one business to another and expect the same results.

Things I find particularly helpful to see at the research stage include:

- The stated problems of those who will be completing the training
- Stated Organisation Values (and if possible, find out the extent to which they are lived and breathed in reality)
- Competence Models (where they exist) and/or a Behavioural Framework
- The Performance Management System
- Any stand-alone training resources available on an LMS
- How the training will be administered/scheduled/managed
- Existing training programmes that link to the topic(s) being researched
- Customer feedback (if published)
- Employee Engagement data (if it exists)
- People actually doing the work, and to spend time observing and talking to them.
- SOPs/SLAs related to the topic being researched

Being able to use/reflect all these things has a number of benefits:

- You don't reinvent the wheel – it may be possible to reuse resources that already exist
- Your training should complement what already exists – or at the very least, not contradict it
- You will use familiar language and jargon, making the training more meaningful
- Training will support the organisation's Values and Competencies
- You can link specific objectives to specific issues
- You can spot potential obstacles and start to think about how you can overcome them

I also like to find out what type of training has been successful/well-received in the past, and what type of training hasn't hit the mark for whatever reason. Past experience needs to be considered, but it's also worth bearing in mind, time – if something failed last year, maybe it would fail now: However, something that

failed 10 years ago may be successful now: the people will be different, and the cultural environment will have changed too.

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

Practical Considerations

Although it would be wonderful, we don't live in an ideal world. As much as we would love it, we don't have a free reign. Training is NOT about us, our preferences or the latest shiny new object in L&D.

There is no point designing a wonderful 3-day event if the client/manager can only release people for half a day. Don't suggest a webinar if most people don't work at computers. Find out what restrictions there are on timescale, times, locations, resources, technology and budget.

I once worked with a charity who wouldn't authorise peak-time travel, so workshops were scheduled to run from 10.30-3.00. If you HAVE to use the offices available, and they will only accommodate 12 people, (and there are no syndicate rooms available) don't write large-scale events or build in lots of syndicate work.

I also ask about timescales and budget. As an external provider, I don't always get an answer to the budget question, but understanding timescales and budget really help to suggest an appropriate solution: For example, I won't recommend the use of actors, or expensive personality profiling if I know the budget won't stretch to it.

As my parents always taught me, you have to cut your cloth to suit your purse.

Other things to consider of a more practical nature include whether a senior manager will sponsor a development programme, 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 self-directed training, how much time they need to do it, what technology they will have access to, how it will be recorded and so on.

This is all to reduce resistance. The easier we can make completing the training, and the more we can offer it in a way that is palatable to delegates, the more likely they are to engage with it.

4. Transfer of Learning

Is your organisation ready?

So, now we have decided that training IS the answer, we've done our TNA and lots of other research to understand exactly where we are now, and how we might get to the desired state.

It's so tempting to get stuck into the training design. And you can – there's nothing stopping you. You have everything you need to get going.

But...

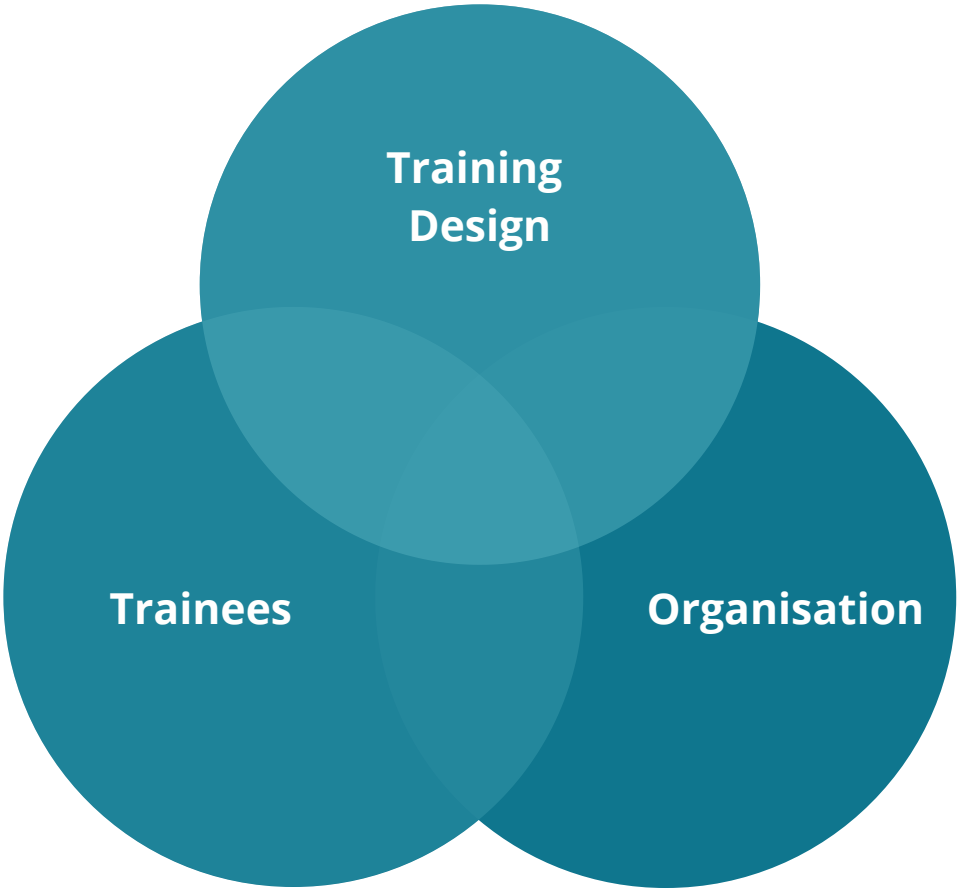
What if you design a great event/programme and it falls flat? Achieves nothing? That would be a terrible waste.

Lots of training fails NOT because it isn't well written or properly researched, but because we don't spend long enough thinking about the transfer of learning.

Transfer of learning is vital – if we can't transfer what's covered in the training back to the workplace, then everyone has wasted their time. The problem with transfer of learning is that it doesn't sit firmly with one set of people or in one place. It's the responsibility of lots of people, and unfortunately, when lots of people are responsible, everyone expects someone else to take responsibility!

Transfer of learning is something that needs to be considered throughout the whole training process – from the initial TNA, through design, delivery and follow-up, so it's worth thinking about it now.

Work done by Dr. Ina Weinbauer-Heidel from the Institute of Transfer Effectiveness has researched the factors that contribute to transfer of learning. There are many things that effect transfer – a lot of them outside of our control. However, she found 12 Levers of Transfer Effectiveness that really make a difference. So, if our training solution is built around these levers, it has a far greater chance of having the positive outcome that everyone wants.



Levers Associated with TRAINEES

- Transfer Motivation – Individuals WANT to complete the learning. No-one is forcing them.
- Self-Efficacy – People believe that the training will add value and they can benefit from it (and be capable of completing it)
- Transfer Volition – Individuals have the resilience to stick at it (particularly longer programmes) and keep going even if it gets difficult.

Levers Associated with ORGANISATIONS

- Support from Managers – Managers take an interest in what has been learned, and actively encourage people to apply what they've learned.
- Support from Peers –Colleagues are supportive and encourage those completing training to put learning into practice.
- Transfer Expectation – The organisation expects a change to occur as a result of training, and notices when it is applied (or not).
- Opportunities for Application – There are opportunities for people to put into practice what they've learned back in the work environment. If they don't occur naturally, they will be created.
- Personal Transfer Capacity – People are allowed to take the time needed to apply what they have learned (e.g. not pressured to hit unrealistic targets whilst mastering new skills).

Levers Associated with TRAINING DESIGN

- Clarity of Expectations – Those completing the learning know exactly what they will learn to do and want to do it
- Content Relevance – There is a clear link between content and requirements of the job – the features and benefits of the training are clear and relevant to participants.
- Active Practice – The training provides real opportunities to experience, experiment and practice new skills in a safe environment.
- Transfer Planning – Individuals are clear about what they need to do after training and have clarity about how they will do it.

Clearly, as training designers (or managers) we can influence every single one of these levers. We can help create a buzz around the training and share success stories before we start enrolling people. We can discuss the organisational factors with key stakeholders to put mechanisms in place to make sure that the environment is right for transferring training. This may mean educating managers, getting agreement for stretch projects, or making sure that successes from training are publicised.

Our main area of influence is under the four areas designated to training design. Practical advice around all four areas is provided throughout this Guide, but in simple terms, the minimum that we should do as training designers is:

- Write clear, behavioural objectives for the training.
- Link content to objectives and objectives to the job. A good way to do this is to specify measurable outcomes as well as behavioural objectives.
- Build in time to every session for proper practice. It doesn't always have to be role plays or job simulations – there are lots of ways to build in practical learning.
- Help people to draw up a clear and detailed action plan. Sometimes the actions may be set for delegates, sometimes they need to select their own, but everyone should leave a training session with a clear plan of what to do now. Sadly, this is often rushed or missed altogether.

We address all of these areas later in this Guide.

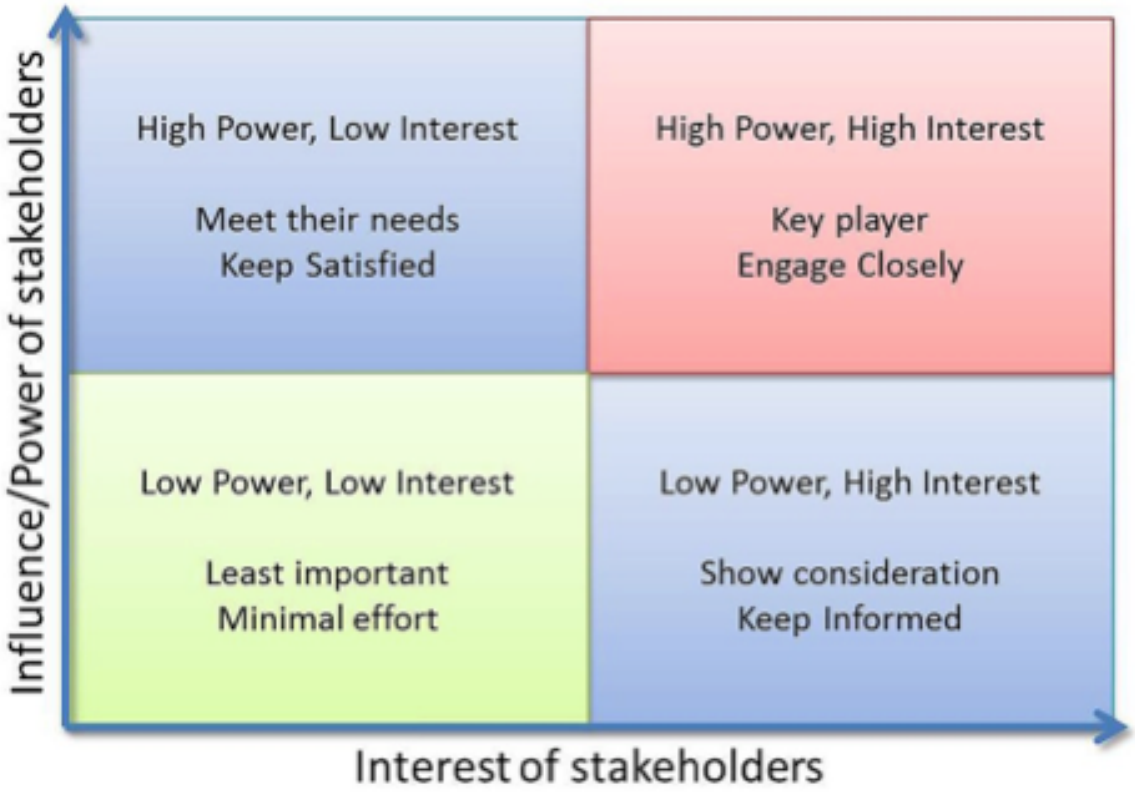
5. Stakeholders

Who are they and what do they want?

In my experience, there are more stakeholders in training than we initially think. Clearly, the person who has spotted the need is a stakeholder, as are the people who will be attending/completing the training. But once word starts to get around that some training is being planned, a surprising number of people want to have some sort of input.

Try to identify all stakeholders at the start. This puts you in control, and you can then decide who you want to engage, at what points, and for what purpose. Hopefully, the number of key stakeholders will be few, and you will be able to check-in with them at appropriate times to get approval or seek guidance.

If there are many, using the Power/Interest grid may be useful to help you decide how best to engage with them...



High power, highly interested people (Manage Closely):
you must fully engage these people, and make sure that they are getting the level of involvement that they expect. Typically, this will include those who you want to have input into the training and/or have the power to sign it off.

High power, less interested people (Keep Satisfied):
put enough work in with these people to keep them informed and ensure that there are no surprises. Updates at key project milestones are usually sufficient, plus a high-level briefing just before completion.

Low power, highly interested people (Keep Informed):
adequately inform these people and talk to them to get their views. People in this category can often be good cheerleaders for the training and can warn you of potential obstacles/problems.

Low power, less interested people (Monitor):
the key here is to respond when asked. It is likely that these people may be aware of what's going on, but don't see it as relevant to them on the whole. Listening to these stakeholders, taking on board their views whilst NOT allowing them to take over the training (resulting in scope creep) can be quite a challenge!

Good training design doesn't happen in isolation – we need the input of others: it adds texture, depth and clarity. However, if too many people get involved the training will lose focus and become muddled. Therefore, the designer must retain control of the project, but they mustn't be protective of it.

If you identify your stakeholders up front, decide what input you want from them, and when, you can keep everyone happy and retain control of the design process. You need to get the right support from the right people at the right time, or your training could be used politically and its impact lost.

As an external provider, I've found that asking for a single point of contact to liaise with me is incredibly valuable. This person can get the views of as many people as they want behind the scenes, but everything is collated so we can go through everything at once. Without this, it's too easy to go around in circles with one stakeholder undoing the work of another or contradicting them.

People often try to piggyback training to act as company communication. This is fine in some cases, but sometimes it needs to be dealt with separately:

too many messages leave the training confusing and it will be doomed to fail.

6. *Aims & Objectives*

What will people be able to do after completing the training?

Being absolutely clear about what your training is trying to achieve is critical. The aim is set in stone. It keeps you focused and helps to stop scope creep. It is decided after the TNA and discussions with stakeholders. The fine details of the training may still be up for debate, but the aim isn't.

Having clear aims and objectives is one of the 12 Levers of Effective Learning Transfer: they describe exactly what the person completing the training will be able to do after the training and how it will benefit them.

Aim/Purpose

You should be able to write the aim of the training in one or two sentences. It describes what the training is all about. In some ways, it's the headline for your training. Good examples of Aims include:

This workshop aims to equip managers with the skills they need to hold effective performance review interviews.

This module will clarify the rules around GDPR in relation to managing customer accounts.

Aims don't give you a lot of detail, but it should be enough to help someone to understand what the training is all about, and whether it may be of use to them. The objectives give more detail and hint at the specific content and the 'level' of delegate that it is appropriate for.

Writing Objectives

Objectives describe what someone will be able to do upon successful completion of the training.

Training objectives should always be written as behavioural objectives if at all possible. Behavioural objectives are objective and can be observed: It's easy to see whether or not they have been achieved. This is important on a number of levels:

- It manages the expectations of all concerned.
- The individual can easily see how much they have progressed, which is motivational.
- The trainer can quickly evaluate if the training has worked.
- The individuals line manager (or organisation, more generally) has clear expectations about what people will be able to do when they come back training (given the right opportunity and support) and what they won't.

According to Robert Mager's "Preparing Instructional objectives", the best behavioural objectives include three key elements: the expected performance (what), the performance conditions (when and where) and the performance criteria (standards).

We need to avoid words like:

- *know*
- *understand*
- *grasp*
- *appreciate*
- *think about*
- *consider*

These things cannot be measured in a meaningful way and will mean different things to different people.

To write good behavioural objectives, Bloom's Taxonomy provides a very helpful guide. The taxonomy was proposed in 1956 by Benjamin Bloom, an educational psychologist at the University of Chicago. It is a way of classifying and describing the different outcomes of learning. It incorporates six levels of learning:

1. **Knowledge:**
Remembering, retrieving, recognising, and recalling relevant knowledge from long-term memory.

2. **Understanding:**
Constructing meaning from oral, written, and graphic messages through interpreting, exemplifying, classifying, summarising, inferring, comparing, and explaining.

3. **Applying:**
Carrying out or using a procedure for executing or implementing.

4. **Analysing:**
Breaking material into constituent parts, determining how the parts relate to one another and to an overall structure or purpose through differentiating, organising and attributing.

5. **Evaluating:**
Making judgments based on criteria and standards through checking and critiquing.

6. **Creating:**
Putting elements together to form a coherent or functional whole; reorganising elements into a new pattern or structure through generating, planning or producing.

Selecting the right level of learning (and so appropriate objective) depends on the nature of the training and topic: Being able to list the ingredients for a Victoria sponge cake is just as valid an objective as being able to make a Victoria sponge cake within the constraints of a lesson – it depends what the aim of your training is.

Knowledge
remembering previously learned facts.

Cite	List	Reproduce
Define	Match	Select
Identify	Name	State
Label	Recognise	

Example: By the end of this Module you will be able to list the six levels of learning in Blooms Taxonomy.

NB: Being able to 'list' doesn't check understanding, but it is something observable, that can be tested during the learning, and therefore we can easily determine whether or not someone can do it.

Understanding
ability to understand or grasp the meaning of material.

Describe	Give Examples	Summarise
Estimate	Illustrate	Translate
Explain	Interpret	Classify

Example: By the end of this Module you will be able to describe the key stages of the disciplinary process.

NB: Again, this doesn't allow us to say how well someone can follow the disciplinary procedure, but if they can describe the key stage, we can be reasonably confident that they understand what the disciplinary procedure involves.

Application
ability to use previously learned material in new and concrete situations.

Apply	Modify	Conduct	Demonstrate
Operate	Show	Produce	Prepare
Construct	Predict	Solve	Use

Example: By the end of this session you will be able to safely use the nail gun to join two different thicknesses of wood together.
By the end of this workshop, you will be able to use the GROW structure to hold a coaching conversation.

NB: We aren't checking understanding (or the theory) here – just ability. Very useful when training technical or practical skills.

Analysis

ability to break down material into its component parts so that its organisational structure may be understood.

Analyse	Differentiate	Infer
Associate	Discriminate	Outline
Determine	Distinguish	Point Out

Example: By completing this Module you will be able to determine if data security has been breached in a number of typical situations.

NB: Here the objective implies a lot of knowledge or skills has gone before – in this case we are looking for proof that a range of knowledge and skill has been applied: the outcome is more important than the specific knowledge being applied.

Evaluation

ability to judge the value of material for a given purpose; the ability to make decisions.

Appraise	Conclude	Judge
Assess	Contrast	Weigh
Compare	Evaluate	

Example: By completing this course you will be able to use the correct process for handing account enquiries.

NB: Again – you won't know what knowledge/skills have been used to do this, just whether or not the individual can complete the task assigned.

Creating

ability to put parts together to form a new whole.

Combine	Develop	Plan	Rewrite	Organise
Compile	Devise	Propose	Tell	Revise
Compose	Integrate	Rearrange	Write	Create
Modify	Reorganise	Design		

Example: By completing this Module you will be able to create and use a pivot table in Excel.

NB: Again, in order to create a pivot table, a range of knowledge and skills must be applied, and it is implied that the learner will work out what they need to know and apply.

Don't think that the higher levels of learning are better than the lower, or that writing objectives to test completion of a full task should always be aimed for: It isn't always necessary or possible.

For example, most line managers don't need to be able to conduct a disciplinar interview or determine whether someone is guilty of misconduct (level 3 and 4). It is far more important that they can describe the disciplinary process, state the point at which an issue should be escalated to HR, and give examples of misconduct. These are all associated with level 1 and 2 and in this example, for this group, it is sufficient.

Equally, overly ambitious objectives can leave people disappointed or set you up to fail. A good example of this is stating an objective along the lines of "by completing this 2-hour module you will devise a customer service strategy". This is unrealistic in the time frame. It may be better to have objectives along the lines of:

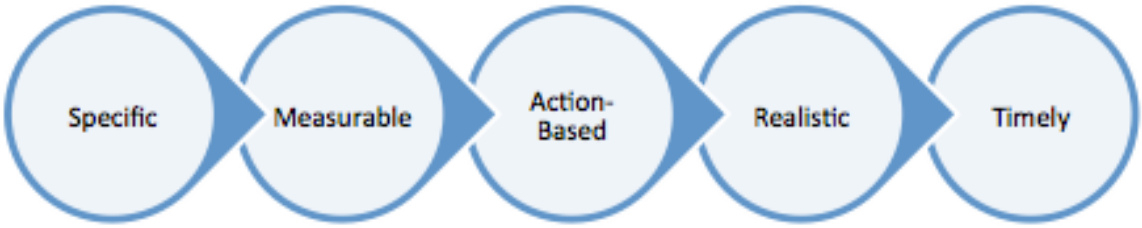
- Describe what should be addressed in a customer service strategy
- Review your own policy and identify the aspects that need further investigation
- Determine who should be involved in creating a customer service policy

Measurable Outcomes

Measurable outcomes provide the link between the training and what happens on the job. They are the specific things that people should do upon return to work to implement the training.

Measurable outcomes can be very simple e.g. Managers will hold a 15-20 minute team briefing at the start of every day. This is observable, and feedback can be given on it. If course attendees AREN'T doing this and the business feels it is important, WHY aren't they doing this? Don't they feel able? (In which case our training has failed). Are they choosing not to (in which case it's a performance management issue) Are they being prevented from doing so? (in which case there is an issue with the system, process or culture).

To be useful, measurable outcomes should be SMART.



SMART outcomes make it easier to measure and therefore easier to evaluate at the end of the programme.

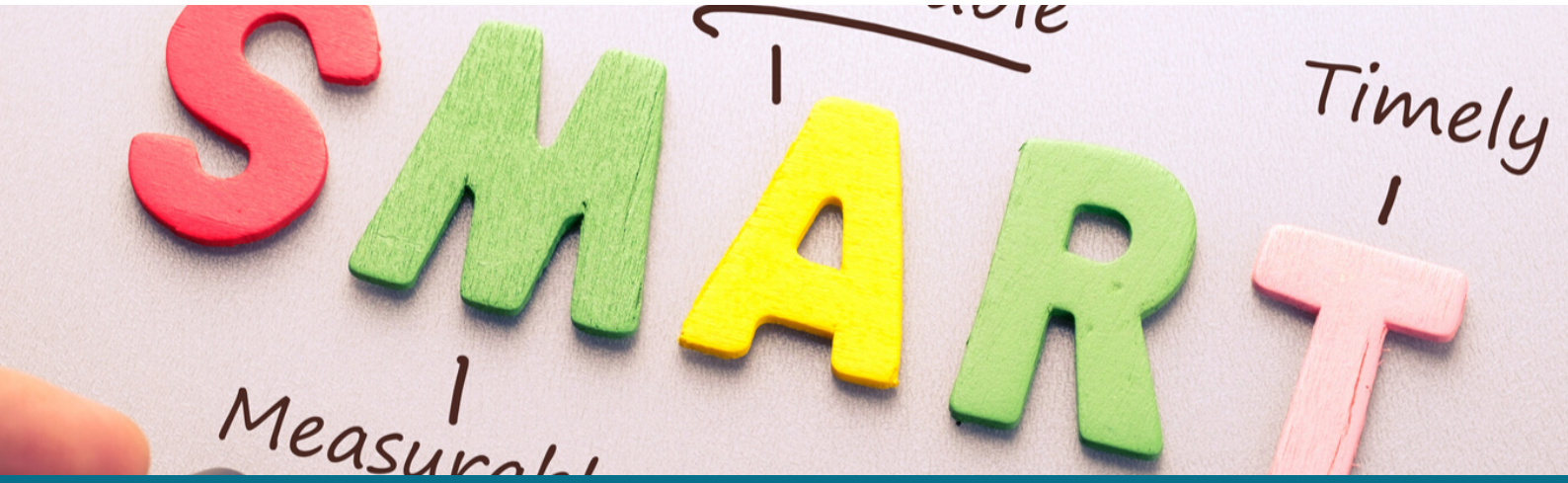
Measurable outcomes hold people to account – both individuals who have completed the training AND their managers. They don't always specify quality. When making a change, we need to focus on creating a new habit. Sensible, achievable measurable outcomes allow people to do that. Quality of behaviour can be developed through feedback and coaching, either via the line manager or (if appropriate and possible) via the trainer or a colleague.

Measurable outcomes will provide a springboard for action planning. It may be that, for compulsory training, delegates MUST implement behavioural outcomes that you specify. Often, they are suggestions. It's very useful to have them so that people can pick the outcomes that are most relevant to them (perhaps after a discussion with their manager). They need to be committed to them, or they won't do them, and the impact of the training will be limited.

Of course, in many cases (particularly management skills training) we would encourage people to define their own measurable outcomes as part of the action planning process.

So, although we wouldn't usually describe measurable outcomes at the start of the course when it is being delivered, we need to start thinking about them right at the start to make sure that our training is going to transfer to the workplace and have an impact of the business.

IF your training objectives have been met AND people are delivering against measurable outcomes and IF the training needs analysis was done correctly, you should see a business improvement. If you don't, it may be that the training event failed to deliver for some reason, OR there are other external forces that are outweighing the impact of the behaviours.



7. Content Scoping

What should we cover, and what should we leave out?

The most important thing to do when deciding on the content is to remember that the training is for your audience and stakeholders – 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, and the objectives that you have created. 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 criticise 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. Generally, as long as things are properly accredited and referenced there isn't a problem but be mindful that some models cannot be used without express permission.

Refer to existing internal documents (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 key stakeholders have specifically asked to be covered.

So, in summary...

8. Blend

What will be in the learning mix?

Blended solutions are widely regarded to be the most useful: they appeal to different ways of learning, allow us to spread the learning over a period of time, make logistics less of an issue and tend to be cost effective.

Blended learning solutions are just that: BLENDED! They have an element of self directed learning and an element of guided learning. They include digital solutions as well as face to face. How you slice it up is up to you!

When you have a good idea of the content, you can analyse it and decide:

- Which should be covered as foundation knowledge, and therefore done first
- What aspects lend themselves well to self-study – typically this will be underlying theories or policies/procedures
- Which elements are less tangible OR are more practical – these are best reserved for face-to-face whether that's in a workshop or one-to-one coaching
- What aspects are nice to know rather than critical – these can be included as stretch aspects or post-course/follow-up work

There are so many tools to facilitate learning, a little research is all that's needed to find the right one for your purpose. Specific tools and apps are being constantly developed but the main approaches to consider are:

Reading books, journals and blogs	Listening to Podcasts	Watching YouTube videos	Paper-based or on-line questionnaires
On-line groups and chats via social media	Workshops	Seminars	Coaching
Action Learning	Project-based work	Mentoring	Traditional e-learning
External events	Networking	Qualifications	On-the-Job Training

Not all self-study/digital elements need to be done as pre-and post-course work. Indeed, some learning solutions may not have a formal workshop. We can include digital aspects in a live environment, and this can work well if it is particularly relevant to the topic or in a large-scale event like a conference.

Face-to-face interaction doesn't have to be an event, or in person. Webinars, virtual classroom and on-line discussions can take place before and after the main event OR can be used to wrap around self-study.

How do you decide which elements should be covered by which format?

There are no definite right and wrong answers here – you need to use a little thought, but also listen to your instincts! Often, it's possible to cover elements in more than one way.

For example:

- You may expect people to complete e-learning on Health and safety procedures, but during a live event, have a case study or quiz to see if they can apply the knowledge/check understanding.
- You may guide people to a podcast, a YouTube video and 3 websites all covering assertiveness, but then lead a discussion about assertive challenges and/or conduct guided role-plays in a bite-size workshop to check they are able to be assertive is situations that are relevant to them.

Generally, theory and process i.e. KNOWLEDGE elements can be introduced as self-study. It's not a good use of time or money to have a trainer telling people factual information that can be obtained elsewhere.

Self-directed learning can also be used to raise awareness before an event – asking people to undertake some personal study before a workshop means that they are more likely to arrive with a basic understanding. This means that time can be spent exploring concepts in more detail and/or practicing skills associated with those topics.

Signposting resources that provide more detailed follow-up learning is also a great way to embrace blended learning: those who want more can go and find it easily.

Some learning is still best provided with a personal touch: Typically, those that are more about SKILLS. Topics such as coaching, interviewing skills, performance management, communication all need a substantial live element. You wouldn't expect someone to be a good swimmer if all they had done was read books and watch instructional videos about swimming – similarly certain interpersonal skills cannot be learned without human interaction.

That said, it isn't always essential that trainers and delegates are in the same room – if your technology permits it, a lot of face-to-face training can be done via video calling and virtual classrooms. However, it isn't a straight transfer, and there are some adaptations required.

Using your LMS or an event management system such as GiraffePad.com can help you to guide people appropriately, monitor completion and provide support. If you expect people to complete learning in a particular order, or within a set timeframe you need to make that clear and ensure that they have sufficient opportunity.

Self-Directed Learning

Although some learning may be delivered purely via self-directed or digital means, most core skills are covered via a variety of methods. Typically, this involves pre-course (self-directed) work, a live learning event, and post-course work or follow-up activities.

Pre-course work is important to manage people's expectations about the training event and provide a context for the learning.

if people are prepared to learn, they are more likely to learn

This is why blended learning is so helpful: It helps to ensure that delegates 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.

Either is a massive waste of time and other resources.

Asking people to complete self-directed 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. It may be a quick 15 minute read, or a substantial e-learning module, watching a couple of videos or reading a whole book – whatever will add the most value and is reasonable to expect someone to do.

Whatever form it takes, the most important thing to bear in mind is that the task is something that will add value to the event, and can be completed alone, with minimal guidance.

Mindset

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. Often this can be done with the facilitator too via social media and chat functions.

People do have to be in the right frame of mind to benefit from learning: they have to understand what they are signing up for and be committed to the learning. It helps if they have a clear vision of what they will be able to do after the learning and how it will make things better for them.

Too often this preparatory discussion is missing, yet it links to so many of the Levers of Effective Transfer: It is crucial.

9. Structuring An Event

How do you decide a structure that flows?

By structuring the main learning event in a logical way, it is easier for the delegates to learn, and therefore they are more likely to transfer their learning to the workplace.

Often, the main event is a training workshop, but a self-guided development programme may be sufficient in some cases. Whether facilitator or learner-led, we still need to provide a clear route through the material to make it accessible and meaningful.

The Event Itself

Having already decided on which aspects of the content will be bought to life in a workshop (or similar), 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.

10. Methods

How can you bring your content to life in a way that is meaningful and will stick?

Having agreed the basic content and structure, the next stage is to decide HOW each of the topics will be covered in the event. The nature of the event, the specific objectives and the makeup 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's main job is to keep us alive – this means choosing safe courses of action for us whenever possible. In most people, it has a natural tendency to avoid the unknown as it could be dangerous.	*In training, the 'unknown and dangerous' is anything new. People will resist change, so as facilitators we need to make the environment as safe as possible.*
Different aspects of our brain handle different aspects of our life. The brain stem handles all our 'basic' functions, the amygdala is the emotion centre, and our pre-frontal cortex can deal with complex cognitive things like problem solving and decision making.	*Make sure the brain stem is happy by creating a comfortable environment for the body: lighting, temperature, regular bathroom breaks etc., and satisfy the amygdala by taking away fear (fear initiatiates a 'fight or flight' response)*

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 covered, how, why and when. Remove distractions such as mobile phones and tablets/ laptops. Build in regular breaks OR changes of activity.*

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 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 draw.

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.

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.

11. Variety

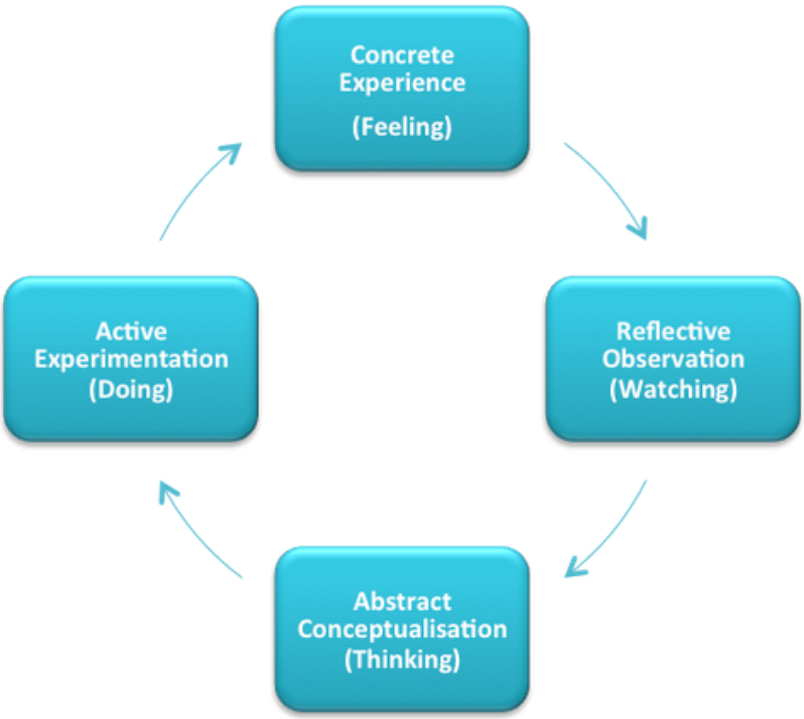
How can you adapt your training to suit different people and different circumstances?

We don't need to be neuroscientists to know that learning without any variety will fail – unless it is micro-learning, in which case it's probably just fine to use just one method. In longer events, we need to work hard to gain and retain attention, to engage people emotionally and make sure that the learning experience in memorable.

Variety keeps us engaged. Different approaches feed our curiosity and curiosity is essential to learning. We do that by appealing to different learning preferences, as well as following the MASTER structure.

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 suggested in his theory that learners must move through a cycle of experiential learning if that learning is going to 'stick'. The cycle is shown below.



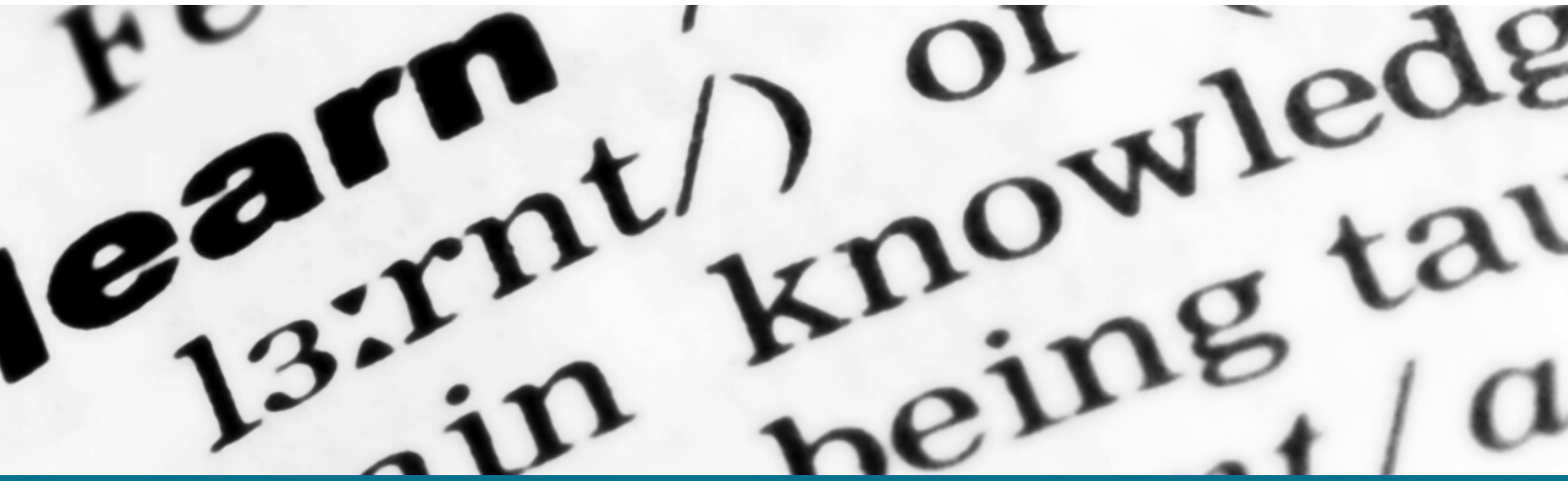
He suggested four stages in learning which follow from each other: Concrete Experience is followed by Reflection on that experience on a personal basis. This should then be followed by an examination of those reflections, and acquisition of facts/theories to understand things more (Abstract Conceptualisation), 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.

One of the reasons that the theory is being disputed is that real life doesn't always follow a nice neat sequence – BUT if you think about the most powerful or learning experiences you've had, you'll find that they include all the elements to a greater or lesser extent.

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 build 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

Kolb's Learning cycle is well known, and Honey and Mumford created a learning styles questionnaire and theory that links to this learning cycle. They suggest that people have a preferred style of learning and will gravitate towards this whenever possible. They DO NOT suggest that people can only learn in one style, or that one style is better than another. The fact is that we all learn in all styles and some topics/skills fit better with some styles than others. What learning styles do help us to understand is the different ways that we can approach learning.



The Four Learning Styles

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 experiementation' 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.

Recently, people have begun to question whether Learning Styles exist at all. Whether you subscribe to the theory or not, the fact is that by utilising different methods, we appeal to different people in different ways, and keep the training varied, which helps to retail attention and increases our chance of making it stick.

Communication Channels - VAK

The VAK communication 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 absorbing information. These three styles are as follows, (and again, there is no right or wrong preference).

Visual

- Someone with a Visual communication 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 communication 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 communication 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 communication channel, but often 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 may have a preference for one learning or communication 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 utilises different styles and types of activity so that it has something for everyone. If learning is considered too boring or too difficult, it's not going to be effective.

Multiple Intelligences

Another theory that you may come across is Howard Gardener's Multiple Intelligences Theory. Again, if we don't take it as scientific fact, but as a useful theory, it can help us to create great learning experiences.

Verbal / Linguistic

Verbal intelligence stresses the importance of words and language, finding information from written words, providing explanations, writing reports and word puzzles. Those strong in this intelligence will enjoy/find it easy to write a set of instructions; speak on a subject; edit a written piece or work; write a speech; commentate on an event; or apply positive or negative 'spin' to a story.

Mathematical / Logical

This emphasises processing information in a logical way, estimating figures, calculations, planning activities and managing time. Those strong in this intelligence will enjoy/find it easy to perform a mental arithmetic calculation; create a process to measure something difficult; analyse how a machine works; create a process; devise a strategy to achieve an aim; and assess the value of a business or a proposition.

Visual / Spatial

This is the ability to perceive the spatial world accurately and is reflected in activities like reading maps, using diagrams and plans. Activities like model making and assembling objects from plans appeal to this intelligence. Those strong in this intelligence will enjoy/find it easy to design a costume; interpret a painting; create a room layout; create a corporate logo; design a building; and pack a suitcase or the boot of a car.

Musical

Musical intelligence is about rhythm, tunes, movement to music and keeping time to help stimulate your brain to make connections with the topic in hand. Those strong in this intelligence will enjoy/find it easy to perform a musical piece; sing a song; review musical work; coach someone to play a musical instrument; specify mood music for telephone systems and receptions, and remember songs or musical/rhythmic patterns.

Interpersonal

This intelligence focuses on the way learners collaborate and interact with others. It is about listening, collaborating and working sensitively with others to achieve results. Group working and generating ideas with others are very useful activities to stimulate the interpersonal intelligence. Those strong in this intelligence will enjoy/find it easy to interpret moods from facial expressions; demonstrate feelings through body language; affect the feelings of others in a planned way; coach or counsel another person and be 'emotionally intelligent'.

Intra-personal

This is about your capacity to learn and be aware of the environments and situations that make thinking more effective. Private reflection is important for those with a strong intra-personal preference. Those strong in this intelligence will enjoy/find it easy to consider and decide their own aims and personal changes required to achieve them, know their own strengths and weaknesses and decide options for development.

Bodily / Physical

This area emphasises importance of the body to express ideas and feeling. Those strong in this intelligence typically need to get 'stuck in' to be active and doing things. It stresses the need to deal with problems physically and skilfully. Someone strong in this intelligence will enjoy/find it easy to remember best what they have done, like a field trip or building a model. They will also be likely to be able to demonstrate a sports technique; flip a beermat; create a mime to explain something; toss a pancake; fly a kite; coach workplace posture, assess work-station ergonomics and so on.

It is tempting to make decisions about training methods and what you would include in a learning event based on your own preferences.

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

As such, it is good practice to consciously mix up pace and style and (where possible) 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.

Different Activities to Consider

Full group discussion	Pairs discussion	Group flipchart work	Case studies	Role Plays
Card sorts	Post-it note exercises	Brainstorming	Drawing/making pictures	Delegate presentations
Watching video	Learning 'games'	Musical flipcharts	Guided Role play	Questionnaires or Quizzes
Individual reading	Personal reflection	Problem solving/ analysis exercises	Simulations	Investigation

This also links to **Sharon Bowman's** training method "trumps" idea (I don't like the word 'trump' so use 'beat' instead!) ... She highlights that when designing (or delivering) a learning event...

Even if you are designing on-line learning, you need to mix it up: Listen, read, complete a quiz, watch a video.

No matter how brilliant your content is, it will have zero effect if it doesn't capture and maintain learners' attention.

Movement Beats Sitting

- So get people out of their chairs. Make them get out of their seats to discuss things or complete actvities.

Talking Beats Listening

- Break up 'presentation' with mini-discussions - either in full group of just in pairs.

Images Beat Words

- Make sure visual aids are VISUAL. Encourage people to draw and doodle as well as write.

Writing Beats Reading

- Encourage delegates to make notes, summarise or fill the gaps rather than just read things.

Shorter Beats Longer

- Make sure you switch pace, method or topic every 15-20 minutes. our attentions spans are short!

Different Beats Same

- Use different methods so your workshop isn't predictable. Variety keeps us alert and interested.

12. Practicalities

How can you make sure your event will work no matter who delivers it, where or when?

There is a school of thought that suggests that we should start by thinking how we can make our learning emotional engaging: Identifying a shocking or high impact tactic that will really grab attention and be memorable. This is definitely something that should be considered, but not as a starting point. It may also be something of a luxury that many organisations can't afford. Taking people to an outdoor retreat, engaging actors or giving people high stake tasks to achieve may be appealing, but there's a cost involved, as well as a big logistical challenge. As a learning designer you should ask the questions and push for these things if they are genuinely important, but more often than not, you have to work within the constraints we are given.

Physical Constraints

Whilst we don't always know where training will occur until later in the process, it's good to ask before you start designing so that you can make sure you stick to what will be physically possible. 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 video, will there be WIFI and a 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 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.

Logistics

For live events, where are participants in relation to the proposed venues? Are there any restrictions on travel (e.g. will overnight stays be authorised?) Will delegates drive to venues or will they rely on public transport? How many people can be released for training at any one time, and for how long?

If it's possible to get answers to these questions before you start detailed design, it can save a lot of re-work! Typically, in relation to the length of session – there's no point in designing an 8 hour session if that won't work. Training has to fit around the business and not be seen to be in conflict with it.

For on-line learning, you have to be sure that people have access to the right sort of equipment, programmes and infrastructure (people will find it difficult to participate in webinars if their broadband is slow, or they work in a noisy environment). You need to know that they will be given the time to attend and not be interrupted.

Technology

Increasingly, it is expected that we create blended programmes which include webinars, on-line courses, e-learning or virtual classrooms. There's a lot of benefits to this, including:

- It makes it easier to include more remote workers
- It cuts down travel and the associated financial, time and climate costs
- It allows programmes to be broken down into smaller chunks
- It adds variety if included as PART of the learning mix
- It's more flexible

However, technology can also bring problems...

- Not everyone uses laptops or tablets as part of their work. They may not have a suitable mobile phone (or be willing to use their own devices to access learning).
- Not everyone has the infrastructure. In many areas of the country, broadband speeds are still very slow and 4g signal patchy.
- Even within one organisation, compatibility can be an issue so this will need to be checked.
- Not every type of training is well suited to on-line delivery (Just because you CAN doesn't mean you SHOULD).

So, we should use technology where it is the right method, fits well with the topic, AND is easy for delegates to use.

Budget

It can be a difficult question to ask but having an idea of budget constraints is important. There's no point suggesting a solution that is too expensive: you have to cut your coat to suit your cloth. Likewise, there's no need to deliver on a tight budget if you have the option of investing in things that will genuinely add value to the learning experience (e.g. using professional role-players, buying in equipment or investing in personality questionnaires). Having an understanding of budget helps you to have a meaningful discussion with key stakeholders about the design process and desired outcomes.

The Learners Themselves

If you don't already know, find out as much as possible about the intended audience: what are their day-to-day job roles? What are their expectations? What is a typical demographic? What have they responded well (and badly) to in the past? Are they tech-savvy or not? Are there any factors you need to be aware of (e.g. mobility, English as a second language etc)?
These factors need to be taken into account when designing your learning event or module. It needs to be accessible and that means making sure that we haven't inadvertently put unnecessary barriers up.

Culture

It's also worth mentioning culture. In a business that's always done things in a bite-size way and/or on-line, organising a 2-day off-site workshop may be a hard sell. Likewise, an organisation that has always delivered training via workshops won't instantly take to on-line courses and e-learning.
That's not to say that that cultural norms shouldn't be challenged, but it is important to introduce change gradually rather than doing something completely different. It is in human nature to be suspicious of change, and too big a change is likely to be met with resistance.

13. Materials

What materials do you need and in what format?

The sort of materials that delegates want and need varies wildly. There's no hard and fast rule – it depends very much on what you are designing! Clearly, if you are designing an e-learning module, the materials will be quite different to those needed for a workshop... and different types of workshop will require different materials. Let's start with live events, typically workshops.

Workshops and other live learning events

At the very least (live) learning events should have:

1. Joining instructions for delegates
2. A complete trainer's guide/session plan (not just a few bullet points)
3. Visual aids (of some kind)
4. Delegate materials (for learners to use during the event and take away)
5. 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

An email invite isn't enough. People miss them and it devalues the whole event. You can be creative with Joining Instructions – sending out physical letters, postcards, recording a video or sending out some sort of pack has more impact and sets a positive tone for your event.

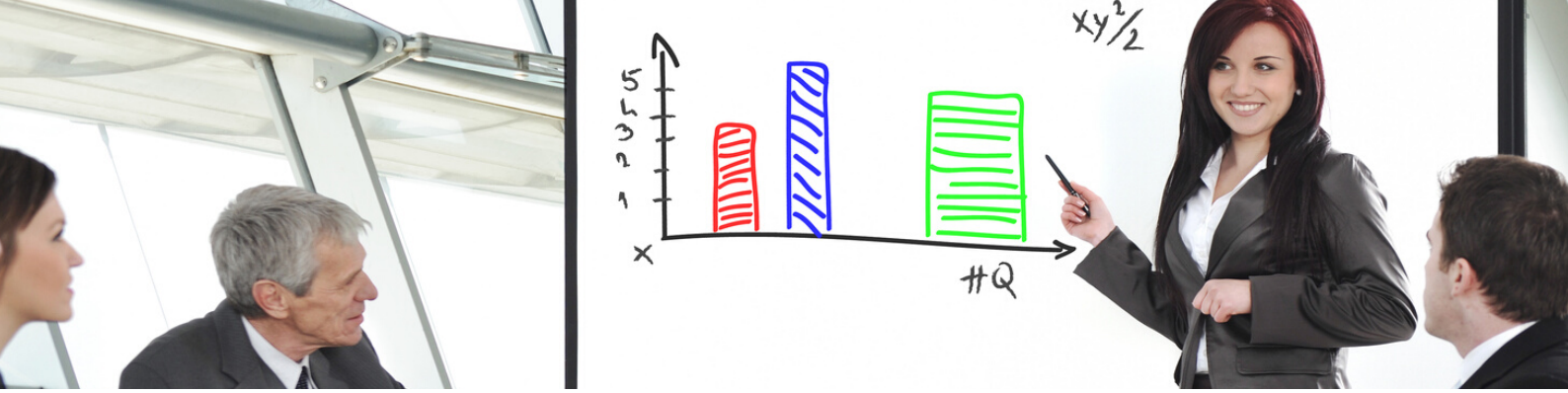
You may also wish to use a platform like GiraffePad that not only allows you to send out invitations, but also encourages engagement before the event.

Session Plan

Even if you are writing for self-delivery, you should always produce a proper session plan, which includes an equipment and materials list and detail of what you will cover and how. 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.



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. Session Plans 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 session plan 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.

You can see an extract of a session plan in the appendix.

Visual Aids

It is inevitable when considering methods and practicalities 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 on-line media, delegate workbooks and handouts.

If you ask delegates for their ideas about something and then show then 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. Increasingly, it is common to provide a digital workbook, or an on-line resources list that can be accessed at the learner's leisure. Whilst it may feel inappropriate to give participants information, especially if you are keen for them to discover their own learning, it can be a risk (in the corporate arena especially) to hope that people take away useful points. Large organisations like to know that certain things have been covered, and that everyone has been provided with key information. Therefore, a compromise is often required with you providing some materials and offering additional materials (handouts, reading lists, copies of slides etc) to those who want it.

Delegate Materials

Whatever the detail of your delegate materials, they should be high quality. Badly photocopied handouts from different sources are not usually that useful and look unprofessional. What delegate materials should you provide?

For most workshops, creating a delegate workbook or handout pack that includes all the key information is good practice. It means that people don't need to spend lots of time making notes during the event and can instead engage fully with the discussions/activities. A detailed workbook or set of handouts also provides a useful reference guide after the event. Often the commissioning stakeholders like this as it provides consistency and reassurance that specific content has been covered. It means that delegates do not have to spend time writing things down. You don't always need to provide a physical workbook– a digital/pdf version is often sufficient.

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.

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.

If you are running technical courses, screen shots and flow-charts can be the most useful take-aways. They don't need to be printed out – they can be sent as pictures after the event.

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.

Sometimes, designers choose to produce very little by way of delegate materials: maybe a two-sided sheet with specific spaces on to capture learning points, or a blank learning journal. If the learning event is very personal or creative, this may be more appropriate than ready-written materials. It's always best to check what resources are expected at the research and scoping stage.

For Virtual, Self-Directed or Online Learning

Instructions

If you are hosting a virtual, live event, you need joining instructions just as you would if you were holding a physical event. For stand-alone learning, people still 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. You may need to provide instructions about how to use the software or interact in the session. This may be done in written format, but may be more appropriate via webinar, video or narrated presentation.

Context/Overview

People will need to have something to help them to decide whether to complete the learning or select which modules to do. Stakeholders may need an overview of the modules so that they can signpost relevant learning and encourage its completion. This needn't be lengthy, but it needs to succinctly explain what the learning will cover, what problems it will solve and how long it is.

Delegate Materials

Clearly, with self-directed or on-line learning, delegate materials are critical: they must stand-alone, be clear to understand and easy to navigate. Whilst it's important to think about accessibility in all delegate materials, it is especially important when there is no facilitator to guide learning. This may mean using subtitled video or adding audio descriptions to diagrams and pictures for example.

With e-learning it's even more important to provide a list of additional resources that learners can access if they wish. Without a trainer or other delegates to ask, their questions need to be pre-empted and answers signposted.

14. Write (or Create)

How can you create materials that gain and retain attention?

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.

Whether it's slides, workbooks, 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 learning event) are perceived.

It is possible to outsource the creation of some of your materials to a training administrator or Virtual Assistant BUT you still need to create the content. They should only ever be used for things like style, proof-reading and branding. The main writing sits with you.

Here are some of my practical tips for writing the training.

Session Plan

Write your Session Plan first. This is the core of your training and everything else hangs off this. Developing your outline (or storyboard) into detailed training notes (or scripts for e-learning) is the most important thing you should do. Using a platform like SessionLab is very useful if you want to collaborate with other trainers, or if you expect that there may be multiple revisions following a stakeholder review. There's no right way to put the content in, but the things that should be included are:

- Key content/models to bring out
- Links to previous points/key business issues/competencies etc
- Timings
- Starter questions for discussions
- Instructions about how to run exercises
- Learning points to bring out of exercises/discussions
- Equipment/visual aids required

Workbooks and Handouts

Use a template to create your delegate materials. If you don't know how to set up styles to ensure the look and feel of your material is consistent throughout, find someone who can help you. You may wish to put lots of detail in a workbook so that delegates don't have to make notes (and allow you to keep your sides to a minimum). Or, you may wish to keep the content to a minimum, perhaps including a few key concepts, some reflection questions and lots of space for personal note-taking. You may prefer to create a digital document that is circulated after the event. There's no right and wrong, but PLEASE:

- Use a template – the 'in house' style where it exists
- Make sure that the formatting is consistent throughout
- Get the materials proof-read
- Select images carefully so they enhance the material and not detract from it.
- Select a format that is appropriate for the topic and will be familiar to delegates

PowerPoint and Slide Alternatives

Not all training sessions require slides. The most important part of any training session is learner engagement, and PowerPoint slides, or other visual aids (such a flipcharts, pictures, product samples) only serve to enhance (or spoil) the experience.

If you decide that slides are important, here are some tips for their use.

1. Choose your background (try to use corporate ones to project professionalism) and look carefully – some are gimmicky and are animated, which can cause a break in the flow of your presentation when it is being delivered.

2. Include only **key information** on a slide, don't be tempted to put your 'script' on the slide and overcrowd it.

3. Stick to one message per slide

4. Edit, edit and edit again!

5. Remember that white space is your friend

6. Adopt a consistent style – constantly changing the font and size, and using too many colours, serve to detract, not enhance.

7. Use a Slide Master to set your style and maintain a consistent style

8. Just because PowerPoint automatically bullet points things, doesn't mean that you need to. Use it how YOU want.

9. Use pictures and diagrams appropriately – either to replace a lot of words or illustrate a point.

10. Animation should be used with care – using it for the sake of it will just look cheap at best or be distracting at worst.

11. Choose one or two styles of slide transition – more will be distracting to the audience and could confuse you.

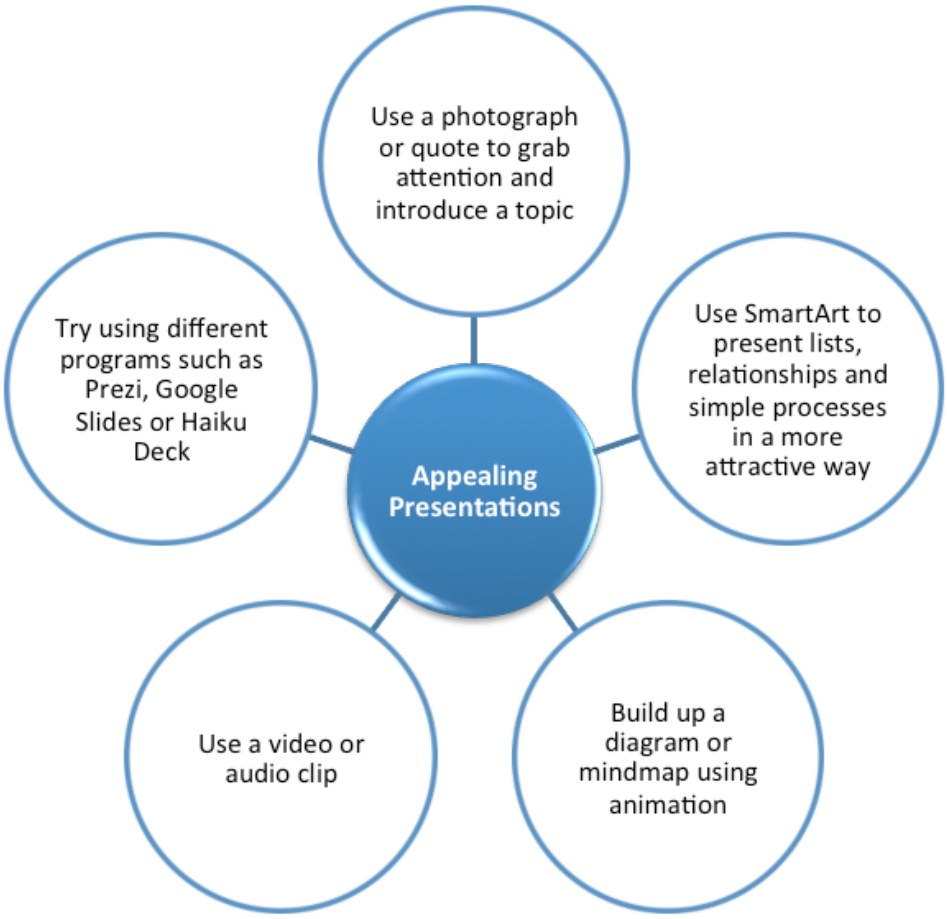
12. Don't use sounds for slide animation or transition. Ever.

13. Don't 'build' every slide – it slows things down and is restrictive if you want to cover points in a different order or group them together.

14. Build in hyperlinks or even page numbers to jump between sections easily to make the session more responsive

15. Check that your links work – whether they lead to other parts of the presentation or to external sites such as YouTube.

Mix up the style of your presentation and use other aids (apart from slides) to gain and retain the audience's attention. Here are some ideas...



Hand-drawn graphics and using flipcharts/whiteboards to allow people to create their own visuals as they go can be very impactful. There are even apps that allow you to hand-draw things on your tablet and share via screen. This means everything can be easily saved and shared after the event and is kinder to the environment!

Equipment and Support materials

Whether you include this as part of the session plan or as a separate document, it's vital to write down EVERYTHING that's needed to run the session, including how many copies of handouts (e.g. one per delegate, or 2 sets), and any links to digital resources.

This makes it far easier for the trainer to do their physical preparation and means that the setting up of the session can be delegated to an administrator.

Far too many last-minute dramas occur because the resources needed for the session aren't clear, and it CAN affect the quality of the delivery, which will reflect badly on your careful design.

A similar good practice is to cross reference the materials. So, if the trainer is explaining a model, highlight which page of the workbook it is on so that they can tell delegates. You also need to be clear about which slide(s) relate to which parts of the session. Using numbers or even including thumbnails of the slides in the session plan help to keep the facilitator on track.

Remember, as the designer, your job is to make the facilitator's life as easy as possible so they can deliver the most effective learning experience possible.

15. Review

What should you do to get your training event approved?

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.

I tend to make proof-reading the last stage of design. You can of course get it done before you show materials to your stakeholders for comment, approval and sign-off. If you have the resources to do this, then do! At the very least, check them yourself. Too many errors will be distracting and may result in a more critical review than is warranted.

The reason for this is that if large scale changes are requested, you haven't wasted time (and potentially money) on proofing content that will never be used.

If passing to stakeholders before final proofing, always make this clear. I advise my clients that they are reviewing for content/messages and that final proofing will be completed when they have approved the content.

Plane English

Eye halve a spelling chequer
It came with my pea sea.
It plainly marques four my revue
Miss steaks eye kin knot sea.

Eye strike a key and type a word
And wieght four it two say
Weather eye am wrong oar write
It shows me strait a weigh.

As soon as a mist ache is maid
It nose bee fore two long
And eye can put the error rite
Its rare lea ever wrong.

Eye have run this poem threw it
I am shore your pleased two no
Its letter perfect awl the weigh
My chequer tolled me sew.

- Sauce Unknown

Peer Review

If possible, ask someone else to review the course AND 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? After spending so long crafting the materials and knowing the content well, you will see what you expect to see. A second pair of eyes is needed.

It's also a great way to keep developing. Your colleague may have an alternative suggestion for an exercise – something that is new to you and so your resource bank grows.

Asking the facilitator to review is also worthwhile. They know how they are likely to run it, and can discuss any uncertainties with you, and/or provide alternative suggestions that you can discuss together and make decisions about.

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.

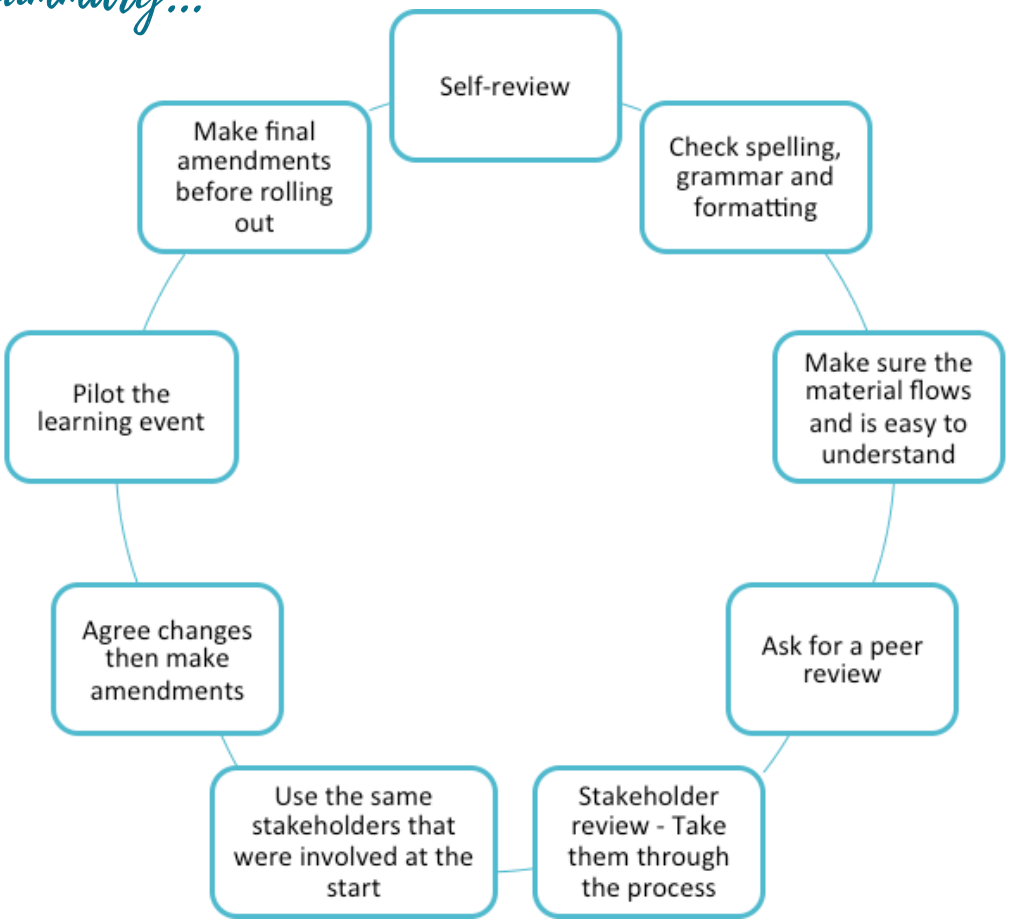
Take them through the process: What the initial need was, the key findings of the research completed, how you intend to meet the needs through training. Remember that they have probably not given much thought to the training for a while whereas you have been immersed in this for a long time!

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...



16. Evaluation

How will you measure success?

Success can be measured in many ways and it is incredibly difficult to attribute a particular outcome to specific training. That's why evaluation remains one of the most difficult aspects of L&D. An individual who feels less confident may say the training has been successful, yet the department manager, seeing no change in KPIs may feel it was a waste.

That's why success should be built in. Evaluation should never be an after-thought.

Clarity of outcomes is crucial

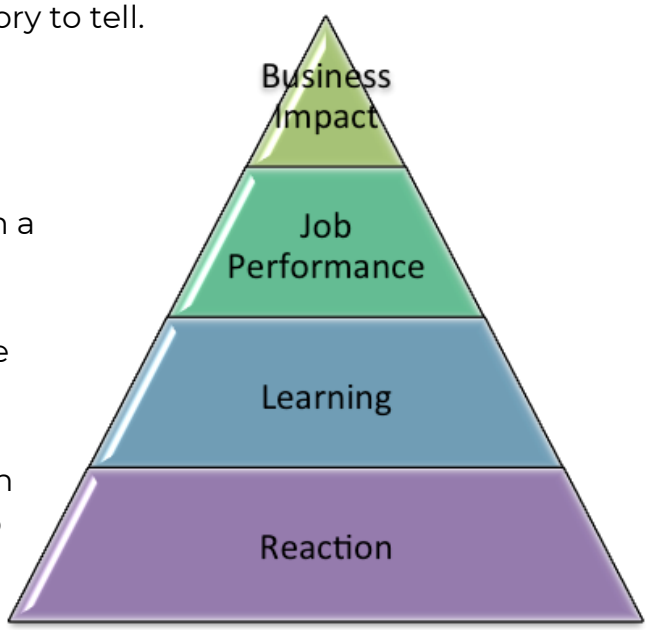
Measurable outcomes are important

Giving proper attention to the 12 Leavers of Transfer Effectiveness is essential

L&D professionals are often asked to provide evidence of success. You have to consider the value of stories and examples as well as numbers. A customer service executive who persuades a large client to stay as a result of training won't have any stats to share, but they will have a great story to tell.

The 4-Levels of Evaluation (KirkPatrick)

The Kirkpatrick Model is well-known, and identifies four levels of outcomes on which a training programme may be evaluated:



It is generally accepted that the higher the level, the harder it is to evaluate with confidence as the effects of training become integrated with other factors such as changed working practices, targets, job roles, business objectives, competitor activity, quality etc.

Level 1 – Reaction Level

Just as the word implies, evaluation at this level measures how participants in a training programme react to it. It attempts to answer questions regarding the participants' perceptions - Did they like it? Was the material relevant to their work? This type of evaluation is often called a "happy sheet." Whilst it can be useful to find out what landed well (and what didn't), the value of evaluating at this level is small.

That said, if people found the experience enjoyable, they are more likely to reflect on and apply it.

However, it has to be borne in mind that delegates often complete evaluation forms quickly at the end of a training session, just before they leave, so may not put a lot of thought into them. In addition, as they are returned to the trainer following live events, delegates may be reluctant to make negative comments.

Practical Methods of Measuring This Level

- Course Evaluation Forms – 'Happy Sheets' completed immediately and returned to the trainer
- On-line or Postal Questionnaires completed shortly after the training
- Face to Face or Telephone Interviews completed shortly after the training
- Training requests made by others as a result of good feedback from delegates attending the course/completing the learning
- Referrals

Level 2 - learning Level

Assessing at this level moves the evaluation beyond learner satisfaction and attempts to assess the extent students have advanced in skills, knowledge, or attitude. Measurement at this level is more difficult than level one, particularly if the learning is highly personal. Methods range from formal to informal testing to team assessment and self-assessment. If possible, participants are assessed before the training (pre-test) and after training (post-test) to determine the amount of learning that has occurred.

Practical Methods of Measuring This Level

- Observed/measured activities during the learning event e.g. role-plays, simulations, mini quizzes
- Pre and Post training tests
- Achievement of academic qualifications
- Interview or discussion with manager or a third party

Level 3 – Job Performance Level

This level measures the transfer that has occurred in learners' behaviour due to the training programme. Evaluating at this level attempts to answer the question - Are the newly acquired skills, knowledge, or attitude being used in the everyday environment of the learner?

For many trainers, this level represents the truest assessment of a programme's effectiveness. However, measuring at this level is difficult as it is often impossible to predict when the change in behaviour will occur, and thus requires important decisions in terms of when to evaluate, how often to evaluate, and how to evaluate.

Usually, the purpose of a training programme is to improve people's knowledge and skills to enable them to do their job better. In technical roles, the link between the training and job performance can generally be measured quite easily. For management roles however, where the nature of the work is less repetitive, more loosely defined and relies on the application of soft skills, the link can be more difficult to find.

The role of the line manager is crucial at this stage as the delegate must have both the opportunity and appropriate support to put their learning into practice. If these are not provided, evaluation at this level cannot be completed. This is beyond the control of the training provider.

Practical Methods of Measuring This Level

- Structured Observations (where clear standards of performance exist)
- Measurable improvements against a competence model
- Improvements in performance ratings linked to appraisal systems
- Achievement of competence-based qualifications
- Anecdotal evidence from the learner themselves, customers, colleagues or subordinates
- Structured interviews with learners and their managers to identify how learning has been applied
- Relevant quantitative data e.g. targets, response times, etc.

Level 4 – Business Impact Level

Frequently thought of as the bottom line, this level measures the success of the programme in terms that managers and executives can understand - increased production, improved quality, decreased costs, reduced frequency of accidents, increased sales, and even higher profits.

From a business and organisational perspective, this is the overall reason for a training programme, yet level four results are not typically addressed. Determining results in financial terms is difficult to measure and is hard to link directly with training.

The business results required from a training programme must be agreed with stakeholders before the programme is designed.

Many of the same measures can be used at this level as in the previous level if they are robust enough. For example, if it is agreed that the competence model relating to the role is relevant, correct and models best practice and links directly to success in the role, it is reasonable to expect that those scoring well here will be making an excellent business contribution.

Practical Methods of Measuring This Level

- Measurable improvements against a competence model
- Improvement in KPIs that are relevant to the content of the learning programme e.g. efficiency, sales, reduced complaints etc
- Use of a balanced scorecard before and after completion of the learning programme

Return on Investment

Quite often, the time and effort required to determine the Return on Investment is not necessary. If training is appropriate to the needs of the delegates and it has been shown that the knowledge and skills have been applied to their role, that should, in most cases be sufficient. Proving ROI is often quite difficult as financial benefits cannot often be isolated as easily as the costs, especially in the area of management training. In addition, much of the data required to carry out such an analysis is often sensitive. Finally, isolating the positive results due to training rather than some other factors is almost impossible to do with certainty.

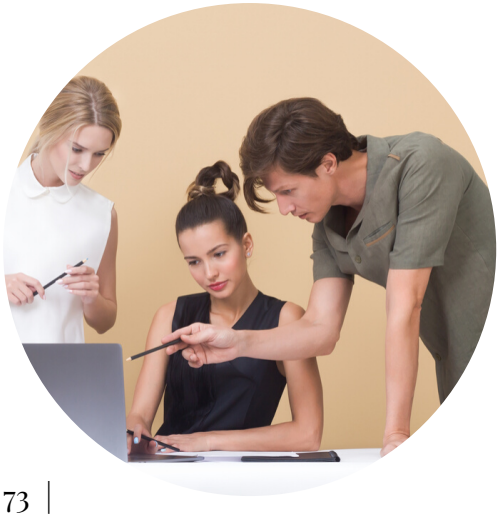
That is not to say that it shouldn't be attempted if it is required!

17. Pilot

Why should you pilot and what will you focus on?

It isn't always practical or necessary to pilot your training event. If you have designed a 1-day workshop that will be run 4 times for the same department, it makes more sense to just tweak it as you go.

If you have done your research, kept the outcome in mind, given proper thought to the design AND designed it in a timely manner, your workshop/programme should be a success. BUT... it's always good to double check. Sometimes things that feel like they should work and look like they should work on paper, don't. It may also be that the content and methods are all right, but in reality, the flow doesn't work naturally, or that we have vastly over or under-estimated timings. It's nice if we can iron out these minor issues before we publicly launch the programme. That's where a pilot comes in.



Who should be involved in a pilot session?

That depends...

You can invite the people who commissioned the training to experience it and see how their vision has been bought to life.

You can invite a cross section of the intended audience and see if it captures their attention and adds value.

You can invite the training team if they are going to be the ones delivering it, so it acts almost as a train the trainer session.

You can invite the managers of the intended audience, thus giving you a sneaky method of training the managers too and talking to them about how best to follow up.

Whoever you invite, they need to be clear about the reason they are there, that they MAY be asked to attend again once the final version is complete AND exactly what you want feedback on. You also need to make sure that your pilot audience is willing and able to give you the type of feedback you want; not what they THINK you want to hear or what they FEEL they should give.

Who should run the pilot session?

That depends...

You could run it yourself and this is fine if it's going to be you running it going forward.

Another trainer may be more insightful if you are going to be asking a number of trainers to deliver it in different locations. Not only will you be able to see which parts of the course work well (and not so well), but also spot where the facilitator has misinterpreted your session plan or chosen to deviate from it. This can lead to a very useful conversation and allow you to refine things before the main roll out.

When asking for feedback from a pilot, it's important that you don't get side-tracked into minor issues: the lunch, the room temperature etc, (though they do need to be considered as part of the overall experience). We also need to separate lack of experience from the value of the content. For example, the facilitator may not have briefed an activity perfectly clearly as they have never run it before. However, the activity itself worked well. You may need to review the instructions, but it may just be one of those things that we accept comes with experience.

Finally, remember that it will never be perfect. Every event will be different and some parts will work brilliantly on one event and land a bit flat on others. That's due to many factors including the personalities of those attending, the room, the mental and physical distractions people have, the style of the trainer, the energy people bring and so on. We have to constantly review and look for patterns. If one exercise doesn't bring out the relevant learning points once, we have to just chalk it up to experience. However, if it happens regularly, then it needs to be replaced.

18. Launch

How can you create some excitement about your event and get people signed up to attend / complete it?

Getting buy-in and stimulating interest in your development programme is vital if it is to be a success. It's such a shame when you have spent months researching, designing and scheduling your programme, only to struggle to fill places. Too many training programmes fail to deliver the expected results NOT because they are poor programmes, but because they aren't managed well. You may have the best programme in the world, but people don't know about it, or don't enrol on it, it doesn't matter.

Sending out an email or putting a note on your LMS will NOT work. People are inundated with emails and they will not look on the LMS unless they are driven there.

Here are a few ideas that can help you to get people interested and signing up:

NEWSLETTERS

- Tell people about your programme!!
- Newsletters should be detailed but in a magazine style
- They could include real life' stories, highlighting useful lessons and sharing top tips (and advertising the programme and other useful resources/development)
- They could be delivered via email but also left out in communal areas
- Maybe do a bi-monthly edition

DRIP FEED

- Share nuggets of useful information regularly via email or social media
- Pose questions and encourage people to 'click for more'
- Have a 'Monday management tip' or Tuesday technical training tip' etc, so people start to expect them

CASE STUDIES AND STORIES

- Tell stories about people who had particular issues to deal with and how they did so successfully, linking to aspects of your programme can help to solve them (help people to recognise themselves and that they might benefit)
- List real life problems that the programme can help with - make it personal

QUIZZES AND QUESTIONNAIRES

- Fun 'assess yourself' type quizzes and questionnaires that make people curious about their result and want to find out more e.g. what's your management style?
- May also include things like crosswords and wordsearches
- Could be included on the intranet, sent out in emails, placed in internal magazines or placed in communcal areas

PERSONAL INVITATION

- An old fashioned physical invitation to sign up to the programme will have more impact than an email

FREE RESOURCES

- Highlight the resources that already exist - resource of the week!
- Theme them so they link to specific modules
- Maybe email out a new resource each week
- To include things like How-To Guides, Videos, Top Tips, Links to blogs, 'real' advice from colleagues etc.

POST CARDS

- Send out Top Tips post cards
- Highlighting one idea, tip or message with a "find out how...." to link to the Programme
- Could be sent to individuals and/or just placed on noticeboards

SOCIAL MEDIA

- Set up social media groups and hosting themed chats
- Using a virtual notice-board to introduce challenges and suggest solutions

SPONSORSHIP AND TESTIMONIALS

- Nothing sells a programme like hearing great role-models sing its praises
- Identify 'champions' at all levels and in all parts of the business who will talk about the programme informally as and when the opportunity arises

When launching a development programme, giving the brain what it craves (and taking away what it fears) is a good way to generate interest. Generally, the brain seeks 5 things:

- Status
- Certainty
- Autonomy
- Relationships
- Fairness

Of course, old-fashioned reward (especially immediate) shouldn't be discounted.

Therefore, when marketing the programme, you may also want to consider:
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- Making the training desirable. Perhaps having entry criteria or limited places. Therefore, those selected to be a part of the 'full' programme will feel special. (Any self-study elements may be open to all, but perhaps the workshops are by invitation only?)
- Making guarantees about the benefits of the programme and linking them to commercial factors
- Highlighting any qualifications/accreditations
- Highlighting the flexible nature of the programme (if that is a feature)
- Stressing the benefits of building relationships with colleagues in other roles and even locations. This shares best practice across the business and helps to build their own personal networks which can aid career development
- Any criteria to participate should be transparent: people need to know what's expected and that it won't change

Summary Tips to Design Great Training

1. Make sure that training is actually required. Training isn't always the answer, but when it IS, make sure it is focused on meeting the right needs and solving the right problems.
2. Consider multiple perspectives when specifying training needs and researching what your training will cover – consider ALL of your stakeholders' needs.
3. Don't just think about content – culture and practicalities must be taken into account when designing training.
4. Link the training to existing resources and things like competence models and values to make it more meaningful and relevant.
5. Think about transfer of learning from the very beginning – what can you put in place to help people to apply what they've learned to the workplace?
6. Use Bloom's taxonomy to write behavioural objectives where possible and create measurable outcomes that help people to make the transition from training environment to working environment.
7. Do a top-level content scoping exercise to start – this helps you to focus the bigger picture and not get taken off track. Make sure that the content you plan to include is directly relevant to the issues you are addressing and the objectives you wish to meet.
8. Know your audience. Make sure any training you design is directly relevant to the intended audience. Make sure it reflects THEIR reality and their environment and methods you plan to use are appropriate for them.
9. Think about how the training will be evaluated or measured and build that into the design.
10. Be creative when thinking about the blend of approaches. There are very many ways that people can access learning these days – think about which methods will work well for your topic and your audience. Using a variety of approaches helps to provide multiple touch points for the learning and increases accessibility.
11. Use a range of methods in your learning events. Whether or not you subscribe to learning preferences, using a variety of methods to explore learning gains and retains engagement.
12. Follow brain-friendly principles to make learning easy to digest and retain. If learning is difficult it won't work. Using brain-friendly techniques maximises retention, understanding and so application.

13. Structure your training so it has a natural flow. Using the MASTER acronym helps you to do this: Mindset, Acquire (knowledge), Sift/Search for Meaning, Trigger the Memory, Exhibit the learning, Reflect and Review.
14. Consider the practicalities associated with your learning event and make sure your training is appropriate. There's no point designing an event that requires specific physical or technology resources that are difficult to provide.
15. For learning events, start with the session plan and write it in detail. Everything else created should be in support of the session plan. Training built on a slide deck has a danger of becoming a presentation with a few activities/discussions thrown in.
16. Create supporting materials that are visually appealing, add value and (as much as possible) can stand alone. People won't refer back to materials that you've spent time creating if they don't appear to be interesting and useful.
17. Get your session reviewed before you run it if at all possible. When you have lived with something for a period of time it's easy to lose perspective. Ask a colleague to review it to check that it is clear, realistic (in terms of timings, mechanics) and that it will achieve the outcomes desired for the intended audience. It can be easy for scope creep to occur during the creative process of designing a learning event. Make amendments as appropriate.
18. Make your materials attractive and get everything proof-read. A great session can be spoiled by simple mistakes or ugly/too simplistic materials. Materials that look professional will immediately place delegates in a positive frame of mind at the start of a learning event.
19. Ask stakeholders to review and sign-off the workshop before it is launched. It is best to talk them through it rather than just send materials, as it can be difficult for them to focus on the right things, especially if they aren't L&D professionals themselves.
20. Pilot your event if possible and launch it with a bang! People won't attend an event, no matter how good it is, if they don't know about it, or don't appreciate how it will help them.

More About The Training Designer's Club

The Training Designer's Club is an on-line community where those responsible for creating learning and development solutions at any level, can chat, share and learn from each other.

It's for you if you:

- are the only person responsible for Training, Learning and Development in your organisation.
- wish you had someone to bounce ideas around with, or act as a second pair of eyes to sense-check your L&D solutions before you launch them to the business.
- have recently moved into an L&D role from a different part of the business and need practical guidance to develop your natural talent.
- worry that your approach to training and development may be a little dated, so would love the opportunity to refresh your skills and share ideas with other training professionals.

The Training Designer's Club was started by me, Sheridan Webb. I am a learning professional who has over 20 years' experience of designing everything from talent pathways, management development programmes, induction programmes, stand-alone bite-size sessions and self-study resources. I realised that there isn't a lot of support or guidance around the concept of training design (whether strategic or specific) and many people are just expected to pick it up. There's no single right way to design learning and development solutions, but there are many mistakes that people make!

The Training Designer's Club aims to help people avoid these mistakes, find their own way and provide on-demand practical development.

There is a free Facebook Discussion Group that you can join that has supportive and active members. Full (VIP members) get the following benefits as well:

- Free training resources including exercises, templates and 'How To' Guides
- Weekly "Designer Drop-In" meetings to discuss what they're working on
- Weekly Top Tips to help them to continuously improve
- Ideas to help kick start their thought process and sense check their ideas
- Collaboration with like-minded learning and development professionals
- Discounts on ready-written training materials
- On-going development of their training design skills via on-line courses, webinars and lunch-n-learn sessions
- Growing their personal learning network to support and challenge them
- Regular updates about the latest thinking in learning and training design

Why Not Join Us?

Visit
www.trainingdesignersclub.co.uk

More About The Author

Sheridan Webb is a learning and development consultant, designer and facilitator with over 20 years' experience creating blended learning solutions for multi-sited businesses in the UK and across Europe.

She is particularly experienced in creating and delivering practical, bespoke solutions that focus on real-world behaviour change and business improvement. Typically focusing on management training and leadership development for first and second-line leaders, her solutions balance process and behaviour, with personal insights and action planning.

Sheridan designed and delivered a blended management development programme for Johnson's Apparelmaster which won the Personnel Today Talent Management Award in 2018. She also designed a blended Manager's Toolkit for Costain which is linked to an ILM qualification and has been running since 2016. She also designed a Manager Fundamentals blended programme for Kellogg's which has been translated into a number of languages for delivery across Europe.

As well as these projects, Sheridan has designed a number of Induction/Onboarding programmes for companies such as Warburton's, Kellogg's, Seddon and Matalan.

She also works at a strategic level helping businesses to decide on their training strategy and approach (most recently with Bede Gaming, and Horwich Farrelly). In addition to the projects already mentioned, she has also designed and delivered development solutions for Aldermore, Johnson Cleaners, The Ardonagh Group and the General Medical Council in the last 5 years.

She created a range of high quality ready-to-use training materials for bite-size courses via Power Hour Training (www.power-hour.co.uk) Fifty modules cover a range of topics including personal effectiveness, leadership and management skills.

Recently Sheridan created on-line courses to help develop practical training design skills for those new to this aspect of L&D and started the Training Designer's Club to provide an on-line and supportive community for those who often work alone.

She lives in the North West of England with her husband and 2 children. She loves to attend Zumba classes. Enjoys walking and gardening, cheese and wine!