7 Strategies for Effective Training
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7 Strategies for Effective Training
Strategy #1: Make Training A Top Priority

Training is a major responsibility. Just think about all the different kinds of training employees need throughout their careers:

- New employee orientation
- Lockout/tagout
- Sexual harassment
- Confined spaces
- Discrimination
- Emergency procedures
- Software upgrades
- Refresher training
- Hazard communication

You can probably add many more topics to this list. There’s no doubt that employee training is an ongoing need in every company. Unfortunately, however, it’s not always a top priority. As the person responsible for training in your organization, you can bring employee learning to the top of the priority list.

How can you accomplish such a feat? By turning yourself into a skilled trainer who inspires lifelong learning in company employees at every level and who keeps up-to-date on the ever-changing and always innovative training industry.

This Special Report will show you how to build an effective training program that motivates and teaches your workforce to be the best in your industry. Use the report to help you become a trainer who makes learning an engaging and enjoyable experience for your trainees. Employees will look forward to learning new skills and reinforcing old ones, and managers will look forward to the increased profits that your well-trained workforce will produce.

Overcome Resistance

One of the first challenges trainers face is a resistance to training from both employees and management. Employees are frustrated at taking time away from their jobs, and managers aren’t convinced that time spent training is time well-spent.

You can convince both groups that training is crucial by proving to them that training doesn’t take employees away from their work, that training is, in fact, a crucial part of their work. In order to remain competitive in today’s global marketplace, it is vital that your company’s workforce maintains the best skills and know-how to produce the best products and services. That means initial training to get up to speed and continual training in all new technologies, systems, or methods that bring more efficiency, more features, and better services.
Conversely, a poorly trained workforce is more likely to turn out poor-quality products. Even if employees receive top-notch initial training, your company can fall behind in the competitive marketplace if employees don’t continue to learn how to do their jobs better.

Training affects the bottom line in every department. Here are a few examples:

**Human Resources**
- Legal compliance avoids fines for the company.
- Career training aids employee retention.
- Discrimination training avoids costly lawsuits.
- Harassment training avoids lawsuits.

**Operations**
- More-efficient employees save costs.
- Training improves productivity—which increases profits.
- Up-to-date training gives you an edge over competitors.

**Safety**
- Regulation compliance avoids costly fines.
- Proper procedures avoid accidents, lost workdays, and workers’ compensation costs.
- Emergency preparation aids quick evacuation.
- First-aid training saves lives.

In short, an effective overall learning program for your company is a good return on investment (ROI). In fact, ROI analysis is an integral part of effective training evaluation because it gives specific measurements to the financial impact of training on the company’s bottom line. ROI answers the question “For every dollar the company invests in training, how many dollars does the company get back?”

**Six More Reasons to Make Training a Priority**

In order to thrive in today’s business world, your company needs to depend on employee education to promote six critical interests:

1. **Effective use of new technology.** As technology continues to revolutionize the workplace, employees at all levels and with all degrees of experience rely on training to keep up with changes in their work processes. Due to its importance, this training will require a comprehensive and continuing effort.

2. **Competitive edge in your market.** U.S. companies now experience fierce competition from overseas operations. In many cases, foreign companies are beating out U.S. firms in quality, cost, and service. In order to remain competitive in the current marketplace, employees need to know how to make better products and services for your market.
3. **Safety and health of employees.** In order to have a productive, creative, and committed workforce, employers need to make sure that employees are protected from workplace hazards and given the knowledge and skills they need to work safely. Safety training is a key component of any organization's productivity and prosperity.

4. **Retention of skilled workers.** Skilled and creative employees seek opportunities for career development and personal growth in their jobs. They want the chance to do challenging work and be well-compensated; they also want to be with a company where they can continue to learn and enhance their skills. If they don’t receive adequate training opportunities in their organization, they will find someplace where they can.

5. **Compliance with laws and regulations.** Training is frequently required under a variety of government regulations. The Occupational Safety and Health Administration (OSHA), for example, requires employers to conduct annual employee training in a number of safety procedures. In other cases, although laws may not require it, training (at least of key employees) is highly advisable to avoid problems (for example, sexual harassment, discrimination, violence prevention, diversity). The cost of not adequately training employees in all of these areas can translate into large fines (for failure to meet the requirements of regulations) or expensive lawsuits (for failing to uphold the rights of protected employees).

6. **Productivity and profitability.** Finally, training makes workers more skilled and knowledgeable, which makes them more productive, better able to meet quality standards, and more able to provide excellent service to customers. Training, therefore, makes organizations more competitive, more profitable, and more successful.

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**Strategy #2:**

**Develop A Training Plan**

Before creating your training program, it is important for you as the trainer to do your homework and research your company's situation thoroughly. By gathering information in several key areas, you better prepare yourself to create a relevant and customized training plan for your company.

You need to accomplish several objectives in order to plan an effective program:

- **Objective 1:** Determine what training is needed.
- **Objective 2:** Determine who needs to be trained.
- **Objective 3:** Know how best to train adult learners.
- **Objective 4:** Know who your audience is.
- **Objective 5:** Draw up a detailed blueprint.
Determine Training Needs

Make use of company resources to help you determine your company's training needs.

- **Company goals.** Refer to your company's stated goals to help you define overall training program goals. Align your training objectives with company goals in such a way that when the workforce meets your objectives, they will also be meeting the company's goals. This process starts with new employee orientation training.

- **Job descriptions.** Include stated job requirements as your base for needed training.

- **OSHA 300 log.** Review this document to identify specific safety needs in your company. Use these injury statistics to identify areas where more safety training is needed.

- **HR complaints.** Review employee complaints to prioritize training on discrimination, harassment, overtime versus compensation time, and other employee issues.

- **Legal obligations.** You must ensure that your training program encompasses all required training to meet government and legal obligations, such as OSHA requirements, Department of Labor requirements, state-specific requirements, and others.

Determine Affected Employees

Once you've compiled the subjects on which you need to train, you need to figure out which employees need which training. Use other company resources to help you determine who needs training.

- **Company policy.** For certain areas or subjects, your organization's policies may spell out who is to be trained, in what, and with what frequency. Use these instructions to start your list of affected employees.

- **Employee records.** Review for safety violations or accidents to determine if employees may need more safety training; for harassment or discrimination complaints, which may indicate the need for more sensitivity training; or for performance reviews that indicate employees may need—or may have requested—more skills training.

- **Performance data.** Review this information to identify weaknesses in performance that may require refresher training in how to use equipment and machines more efficiently or in how to use more productive procedures.

You can also develop your own methods for determining which employees need training, ranging from informal to formal.

- **Observations.** Keep your eyes and ears open in your workplace and you may identify employees who need training in specific areas.

- **Informal discussions.** Talk with employees, supervisors, and managers to get candid information about areas where people feel well-equipped to do their jobs and areas where they are uncomfortable.
◆ Focus groups. This method involves selecting a group of hand-picked employees and asking them designed questions regarding training. This activity gives you the opportunity to gather data from a few people in a short period of time. Focus groups are good for brainstorming, which can be a valuable source of information. Make sure the selected members are outspoken. A quiet participant may be hesitant to contribute.

◆ Interviews. Personal interviews can be very effective for discovering what training employees want, but it can also be very time-consuming. This method is best for specialized training that affects a small percentage of the workforce.

◆ Questionnaires. Compose a few questions specific to training you are planning. This method is effective for elective training or for new training areas in which you want to begin programs. Keep answers confidential so employees feel comfortable submitting their input.

◆ Skill tests or demonstrations. Give written tests or have employees perform demonstrations on certain equipment to determine who needs additional training.

Know How to Train Adult Learners

Most adults are self-directed learners. They want to learn what they want, when they want, and how they want. Adult learners have their own style of learning that includes four key elements, discussed below. Even if you structure your training program to meet these elements, however, you may still run into reluctant learners. We also provide seven rules for training reluctant or resistant learners.

The Four Elements of Adult Learning

1. Motivation. To motivate adult learners, set a friendly or open tone to each session, create a feeling of concern, and set an appropriate level of difficulty. Other motivators for adult learners include:
   
   ◆ Personal achievement—including attaining higher job status or keeping up with or surpassing competitors
   
   ◆ Social well-being—including opportunities for community work
   
   ◆ External expectations—such as meeting the expectations of someone with formal authority
   
   ◆ Social relationships—including opportunities to make new friends that satisfy people's desire for association
   
   ◆ Stimulation—that breaks the routine of work and provides contrast in employees' lives
   
   ◆ Interest in learning—which gives employees knowledge for the sake of knowledge and satisfies curious minds

2. Reinforcement. Use both positive and negative reinforcement to be successful in training adult learners. Use positive reinforcement frequently, such as verbal praise, when teaching new skills in order to encourage progress and reward good results. Use negative reinforcement, such as negative comments on a performance review, to stop bad habits or performance.
3. **Retention.** Adults must retain what they’ve learned in order to realize benefits on both the personal and companywide levels. Achieve great retention rates by having trainees practice their newly acquired skills again and again until they are familiar and comfortable enough to ensure long-term success.

4. **Transference.** Adults want to bring what they learn in training directly to the workplace. Positive transference occurs when adults are able to apply learned skills to the workplace. Negative transference occurs when learners can’t—or don’t—apply skills to the workplace.

**Know Your Audience**

In order to make every training session as effective as possible, you need to analyze the participants in each group. Gather the following information about group members:

**What is their background?**
- How much training have they had on this topic?
- Why does management think they need more training?
- Do any trainees have any relationship with the trainer (acquaintances, jobs are related)?
- Do any trainees have high levels of responsibility or authority in the organization?

**What are the demographics of the group?**
- How many trainees are in the group?
- What is the average age?
- What is the ratio of men to women?

**What is their educational level?**
- What is their level of expertise?
- How much prior knowledge do they have about the session topic?
- Do some know more than others?

**What is the overall attitude of the group?**
- Is this voluntary or required training?
- Do they want to be here?
- What do they think of the subject matter?
- What do they think about the trainer?
- Are they a friendly group?

**What are their expectations?**
- Can the trainer meet their needs?
- Will the training benefit the participants?
- Will the training benefit the trainer? The organization?
- Could there be disadvantages as a result of the training session?
You also need to know what kind of learners trainees are. In general, people learn in one of three ways:

- **Visual**—These learners receive information best through seeing or reading it. Their brains process the information and retain it once they see it. These learners benefit from written instructions, diagrams, handouts, overheads, videos, and other visual information.

- **Oral**—Oral learners receive information best when they hear it. They respond best to speakers, audioconferences, discussion groups, Q&A sessions, and other oral information.

- **Kinesthetic or tactile**—These learners learn by touch and feel. They will benefit from show and tell where equipment is available to handle. They also respond well to demonstrations of new procedures and in having the chance to practice themselves.

You will inevitably have all three kinds of learners in every training session. It’s important, therefore, that you plan to use a combination of teaching styles in your training.

**Draw Up a Detailed Plan**

You’ve done your homework and know what your training needs are, who needs to be trained, and how best to train them. Now you need to develop a plan. Here’s how:

1. **Set specific goals to meet each training need you’ve identified.**
   - Use quantifiable measurements for the accomplishments you want employees to achieve after training, such as an increased production quota or decreased injury rates.
   - Use charts, graphs, and tables wherever possible to show management specific numbers and trends that your training program will achieve. For example, chart the increased productivity curve you plan to reach with your training or graph the injury rate you hope to achieve.
   - Set realistic targets that are achievable, but not necessarily easy to achieve. Know your trainees well enough to know how to challenge them to reach for more effective performance. For example, look at the highest production peak employees have ever achieved, even if it was only one time, and set your target slightly above this point. Employees know they can achieve it because they already have. But they also know it’s challenging to accomplish.

2. **List everyone who needs to be trained in each topic area.**
   - Use these lists to help you customize your training to your audience.
   - Prepare trainees by communicating before sessions with prequizzes, agendas, or requests for specific areas trainees want addressed in the training.

3. **Set up a training schedule.**
   - Make a master schedule of all the training you want to conduct for this month or this year.
   - Within the master schedule, set specific dates for each session.
Include makeup dates for trainees who cannot attend scheduled sessions. Use a logical progression for multipart training; make sure sessions aren’t too far apart that trainees forget the first training or too close together that trainees suffer information overload. Also allow time for trainees who want more training in the first session to receive it before the next session is held.

4. **Choose the appropriate method(s) for each group of trainees in each topic area.**
   - Plan to use more than one training method for each topic to ensure that you reach all the types of learners in the session.
   - Plan flexibility into your use of materials so that you are prepared for technical difficulties or other problems.
   - List the materials and methods you plan to use in each session.

Once you have all of this information collected and organized, you are in great shape to develop the specifics of your training sessions.

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**Strategy #3: Choose Effective Training Techniques**

There are numerous methods and materials available to help you prepare and equip employees to do their jobs better. Indeed, with so many choices out there, it can be daunting to determine which methods to use and when to use them.

**Overall Considerations**

Before considering specific training techniques, ask yourself these questions:

1. **What are your training goals for this session?**
   - New skills
   - New techniques for old skills
   - Better workplace behavior
   - A safer workplace
   - A fair and equal workplace free of discrimination and harassment

2. **Who is being trained?**
   - New employees
   - Seasoned employees
   - Upper management

3. **What is your training budget?**

4. **How much time has been allocated for training within your organization?**

5. **What training resources and materials do you have at your disposal?**
Your answers to these questions begin the narrowing process for your training choices. Now let’s examine those training methods, their pros and cons, and where they best fit in a training program.

### Classroom or Instructor-Led Training

Instructor-led training remains one of the most popular training techniques for trainers. There are many types, including:

- **Blackboard or whiteboard.** This may be the most “old-fashioned” method, but it can still be effective, especially if you invite trainees to write on the board or ask for feedback that you write on the board.

- **Overhead projector.** This method is increasingly being replaced with PowerPoint® presentations, which are less manually demanding, but overheads do allow you to write on them and customize presentations easily on the spot.

- **Video portion.** Lectures can be broken up with video portions that explain sections of the training topic or that present case studies for discussion.

- **PowerPoint® presentation.** Presentation software is used to create customized group training sessions that are led by an instructor. Training materials are provided on CD-ROM and displayed on a large screen for any number of trainees. Employees can also use the programs individually, which allows for easy make-up sessions for employees who miss the group session. This method is one of the most popular lecture methods and can be combined with handouts and other interactive methods.

- **Storytelling.** Stories can be used as examples of right and wrong ways to perform skills, with the outcome of each way described. This method is most effective with debriefing questions, such as:
  
  — How does this story relate to training?
  
  — How did the main character's choices make you feel?
  
  — What assumptions did you make throughout the story? Were they correct?
  
  — What would you have done differently?

This technique makes communication easier since it is nonthreatening with no one right answer. It is cost effective, especially if trainers have their own stories to tell. Stories can also make sessions more personal if they involve people trainees know. You can also find many training stories online.

### Advantages

- Instructor-led classroom training is an efficient method for presenting a large body of material to large or small groups of employees.

- It is a personal, face-to-face type of training as opposed to computer-based training and other methods we will discuss later.

- It ensures that everyone gets the same information at the same time.

- It is cost-effective, especially when not outsourced to guest speakers.

- Storytelling grabs people’s attention.
Disadvantages

✓ Sometimes it is not interactive.

✓ Too much of the success of the training depends on the effectiveness of the lecturer.

✓ Scheduling classroom sessions for large numbers of trainees can be difficult—especially when trainees are at multiple locations.

You can use lectures effectively by making sure your audience is engaged throughout the session. Here are several ways to achieve this:

✓ Train your trainers in the art and science of public speaking.

✓ Give your trainers the materials they need.

✓ Use with interactive methods.

Interactive Methods

There are many ways that you can break up training sessions and keep trainees attentive and involved, including:

✓ Quizzes. For long, complicated training sessions, stop periodically to administer brief quizzes on information presented to that point. You can also begin sessions with a prequiz and let participants know there will also be a follow-up quiz. Trainees will stay engaged in order to improve their prequiz scores on the final quiz. Further motivate participants by offering awards to the highest scorers or the most improved scores.

✓ Small group discussions. Break the participants down into small groups and give them case studies or work situations to discuss or solve. This is a good way for knowledgeable veteran employees to pass on their experience to newer employees.

✓ Case studies. Adults tend to bring a problem-oriented way of thinking to workplace training. Case studies are an excellent way to capitalize on this type of adult learning. By analyzing real job-related situations, employees can learn how to handle similar situations. They can also see how various elements of a job work together to create problems as well as solutions.

✓ Active summaries. Create small groups and have them choose a leader. Ask them to summarize the lecture’s major points and have each team leader present the summaries to the class. Read a prewritten summary aloud and compare this with participants’ impressions.

✓ Q&A sessions. Informal question-and-answer sessions are most effective with small groups and for updating skills rather than teaching new skills. For example, some changes in departmental procedure might easily be handled by a short explanation by the supervisor, followed by a question-and-answer period and a discussion period.

✓ Question cards. During the lecture, ask participants to write questions on the subject matter. Collect them and conduct a quiz/review session.
Role-playing. By assuming roles and acting out situations that might occur in the workplace, employees learn how to handle various situations before they face them on the job. Role-playing is an excellent training technique for many interpersonal skills, such as customer service, interviewing, and supervising.

Participant control. Create a subject menu of what will be covered. Ask participants to review it and pick items they want to know more about. Call on a participant to identify his or her choice. Cover that topic and move on to the next participant.

Demonstrations. Whenever possible, bring tools or equipment that are part of the training topic and demonstrate the steps being taught or the processes being adopted.

Other activities.
- Create a personal action plan.
- Raise arguments to issues in the lecture.
- Paraphrase important or complex points in the lecture.

Advantages
✓ Interactive sessions keep trainees engaged in the training, which makes them more receptive to the new information.
✓ They make training more fun and enjoyable.
✓ They provide ways for veteran employees to pass on knowledge and experience to newer employees.
✓ They can provide in-session feedback to trainers on how well trainees are learning.

Disadvantages
✗ Interactive sessions can take longer because activities, such as taking quizzes or breaking into small groups, are time-consuming.
✗ Some methods, such as participant control, can be less structured, and trainers will need to make sure that all necessary information is covered.

Hands-On Training

Experiential, or hands-on, training offers several more effective techniques for teaching employees, including:

Cross-training. This method allows employees to experience other jobs, which not only enhances employee skills but also gives companies the benefit of having employees who can perform more than one job. Cross-training also gives employees a better appreciation of what co-workers do and how their own jobs fit in with the work of others to achieve company goals.
- **Demonstrations.** Demonstrations are attention-grabbers. They are an excellent way to teach employees to use new equipment or to teach the steps in a new process. They are also effective in teaching safety skills. Combined with the opportunity for questions and answers, this is a powerful, engaging form of training.

- **Coaching.** The goal of job coaching is to improve an employee’s performance. Coaching focuses on the individual needs of an employee and is generally less formal than other kinds of training. There are usually no set training sessions. A manager, supervisor, or veteran employee serves as the coach. He or she gets together with the employee being coached when time allows and works with this employee to:
  - Answer questions
  - Suggest more-effective strategies
  - Correct errors
  - Guide toward goals
  - Give support and encouragement
  - Provide knowledgeable feedback

- **Apprenticeships.** Apprenticeships give employers the opportunity to shape inexperienced workers to fit existing and future jobs. These programs give young workers the opportunity to learn a trade or profession and earn a modest income. Apprenticeship combines supervised training on the job with classroom instruction in a formal, structured program that can last for a year or more.

- **Drills.** Drilling is a good way for employees to practice skills. Evacuation drills are effective when training emergency preparedness, for example.

**Advantages**
- ✔ Hands-on training methods are effective for training in new procedures and new equipment.
- ✔ They are immediately applicable to trainees’ jobs.
- ✔ They allow trainers to immediately determine whether a trainee has learned the new skill or procedure.

**Disadvantages**
- ✗ They are not good for large groups if you do not have enough equipment or machines for everyone to use.
- ✗ Personal coaching can be disruptive to the coach’s productivity.
- ✗ Apprenticeship can be expensive for companies paying for employees who are being trained on the job and are not yet as productive as regular employees.
Computer-Based Training (CBT)

Computer-based training is becoming increasingly prevalent as technology becomes more widespread and easy to use. Consider the following types:

- **Text-only.** The simplest CBT programs offer self-paced training in a text-only format. These programs are similar to print-based individualized training modules with the addition, in most cases, of interactive features. While simple in format, these programs can be highly effective and present complicated information and concepts in a comprehensible and easily accessible way.

- **CD-ROM.** A wide variety of off-the-shelf training programs covering a broad range of workplace topics are available on CD-ROM. Programs can also be created by training consultants for the specific needs of the particular organization or individual departments.

- **Multimedia.** These training materials are an advanced form of CBT. They are much more sophisticated than the original text-only programs. In addition to text, they provide stimulating graphics, audio, animation, and/or video. Multimedia tend to be more provocative and challenging and, therefore, more stimulating to the adult mind. Although costs are higher than text-only software, the benefits in terms of employee learning may well be worth it. Multimedia training materials are typically found in DVD format.

- **Virtual reality.** Virtual reality is three-dimensional and interactive, immersing the trainee in a learning experience. Most virtual reality training programs take the form of simulation, which is a highly effective form of training. It is hands-on experience without the risks of actual performance. Flight simulators, for example, have been used successfully for years to train airline and military pilots in critical flying skills, as well as to prepare them for emergency situations in a safe and forgiving environment.

**Advantages**

- CBT programs are easy to use.
- They can often be customized or custom designed.
- They are good for helping employees develop and practice new skills.
- They are useful for refresher training.
- They are uniform, which makes it possible to standardize training.
- They are measurable. When computers are used for training, it is possible to track what each employee has learned right on the computer. Most programs have post-tests to determine whether the employee has understood the training. Test scores give trainers statistics for training evaluations.

**Disadvantages**

- These programs require trainees to be computer literate.
- They require trainees to have computer access.
- There is little or no interaction with a trainer; if trainees have questions, there's no one to ask.
- These programs are not effective at teaching “soft-skills,” such as customer service, sales, or sensitivity training.
They are not the best choice for new or one-time training. Trainers need live interaction to ensure new skills or concepts are being communicated. Trainees need to be able to ask questions and receive feedback.

Some poorly designed programs are “boring” and result in trainees having a poor retention rate of the material as well as a low finish rate.

Online or E-Learning

In addition to CBT, many companies with employees in a variety of locations rely on other technologies to deliver training. This method is becoming more and more popular as access to the Web becomes more widely available. Some examples include:

- **Web-based training.** This method puts CBT modules onto the Web, which companies can then make available to their employees either on the company’s intranet or on a section of the vendor’s website that is set up for your company. There are many courses available on the Internet in many different topic areas. These courses provide a hands-on, interactive way for employees to work through training presentations that are similar to CD-ROM or PowerPoint® on their own. Training materials are standardized because all trainees will use the same program. Materials are also easy to update, so your training is always in step with your industry. Web-based training programs are also often linked with software (a learning management system, or LMS) that makes trainees’ progress trackable, which makes recordkeeping very easy for the training administrator.

- **Tele- or videoconferencing.** These methods allow the trainer to be in one location and trainees to be scattered in several locations. Participants are networked into the central location and can usually ask questions of the trainer via the telephone or by a webchat feature. Lectures and demonstrations can be effective using this method.

- **Audioconferencing.** This method is similar to videoconferencing but involves audio only. Participants dial in at the scheduled meeting time and hear speakers present their training. Question and answer sessions are frequently held at the end of sessions in which participants can e-mail questions or call in and talk to a presenter.

- **Web meetings or webinars.** This method contains audio and visual components. Participants dial in to receive live audio training and also follow visual material that appears on their computer screens. These presentations are similar to CD-ROM or PowerPoint presentations and sometimes offer minimal online interactivity. Q&A sessions may also be held at the end of sessions.

- **Online colleges and universities.** This method is also known as distance learning, and many schools now offer certificates or degrees through online programs that require only minimal on-campus residency.

- **Collaborative document preparation.** This method requires participants to be linked on the same network. It can be used with coaches and trainees to teach writing reports and technical documents.

- **E-mail.** You can use e-mail to promote or enhance training, send reminders for upcoming training, solicit follow-up questions for trainers and/or managers, and conduct training evaluations through e-mail forms.
Advantages

✔ Online or e-learning programs are effective for training across multiple locations.
✔ They save the company money on travel expenses.
✔ They can be a less expensive way to get training from expert industry professionals and consultants from outside the company.
✔ They are useful for refresher training.
✔ They are good for self-directed learning.
✔ They can be easy to update with new company policies or procedures, federal regulations, and compliance issues.
✔ They offer trainers a growing array of choices for matching training programs to employee knowledge and skill levels.

Disadvantages

✗ These programs require trainees to be computer literate.
✗ They are usually generic and not customized to your company's needs.
✗ Some employees may not like the impersonal nature of this training.
✗ Employees may be too intimidated by the technology or the remoteness of the trainer to ask questions.
✗ Lack of computer terminals or insufficient online time may restrict or preclude access to training.
✗ Inadequate or outdated hardware devices (e.g., sound cards, graphics accelerators, and local area networks) can cause programs to malfunction.
✗ Your company's Internet servers may not have enough bandwidth to receive the materials.
✗ Self-instruction offers limited opportunities to receive context-specific expert advice or timely response to questions.

Blended Learning

Blended learning is a commonsense concept which simply acknowledges that one size doesn't fit all when it comes to training. In a nutshell, blended learning means using more than one training method to train on a subject.

This approach works well because the variety of approaches keeps trainers and trainees engaged in training. Blended learning simply makes a lot of sense. Consider the many factors that affect training:

♦ Subject matter
♦ Audience make-up
♦ Types of learners
♦ Budget considerations
♦ Space constraints
♦ Compliance issues
Any or all of these considerations affect your choices for training and may even necessitate that you use a blended learning approach. Chances are you already use this method, perhaps without even realizing it. Have you ever:

◆ Used a PowerPoint® training session and incorporated written quizzes, small group discussions, and role plays at various points in the training?
◆ Broken a complex subject into parts and used a different training method to teach each section or step?
◆ Used a live trainer with hands-on demonstrations for initial training and a CD-ROM or online course for refresher training?

If you have done any of the above methods, you are already using a blended learning approach.

Here’s how to plan a blended learning training program. Once you’ve identified training needs, answer these questions about each situation:

◆ What are the training conditions?
◆ Do you have a classroom? How many people will it hold?
◆ How many computers do you have access to?
◆ What resources are available?
◆ What are the characteristics of the training content? Is it soft or hard?
◆ Who is your target audience?
◆ What are its demographics?
◆ How many languages do you need to accommodate? Which ones?
◆ How many employees need this training?
◆ How quickly do you need to accomplish this training?

Your answers will direct you to the optimal delivery method. However time consuming this process may seem, blended learning offers trainees a well-planned session that is custom-designed for them, the subject, and the learning environment. In the long run, blended learning saves time and money since this training process is an efficient use of resources to help employees develop sufficient levels of knowledge retention.

Sometimes your analysis of a training need will point you toward outside resources. There are many quality training products available that provide top-notch, inexpensive materials. But how do you know which one to choose?
Strategy #4: Outsource Training if Necessary

You may find that after analyzing your company’s training needs you don’t have the best training materials or most qualified personnel in-house. There are a variety of reasons why you might decide to purchase prepackaged training materials or bring in outside trainers:

1. You have complex regulations to comply with, such as those governing safety or environmental issues.
2. You have legal requirements to meet, such as those governing equal opportunity, harassment, and discrimination.
3. You have a small staff and don’t have enough (or any) qualified trainers.
4. You have large numbers of employees who need refresher training.
5. You want to keep employees up-to-date on what’s happening in your industry.

With regards to regulatory compliance, several organizations and laws affect your company. Keeping track of their requirements may seem overwhelming, but there are many quality training programs on the market that you can use to keep your company in compliance. Outsourcing may be the most efficient way to meet your company’s many legal requirements.

Government Regulations

Companies often go to considerable expense and effort to comply with government regulations regarding training employees to protect their health and the environment. Here are some of the laws and agencies, along with their approach to required training:

Employment Laws

The United States has many employment laws designed to protect employees and to guarantee a workplace that is fair and equal for all. Most of these laws spell out what employers can and cannot do with regard to employment decisions, but they do not include specific training requirements. Nevertheless, training is often encouraged on topics such as sexual harassment, discrimination, and employee rights.

The Equal Employment Opportunity (EEO) laws serve as gatekeepers to diversity in the workplace. Specifically, these laws operate to prevent employers from implementing or maintaining hiring and other employment practices that may block diversity from the workplace “door.”
**Title VII** of the Civil Rights Act of 1964 generally prohibits employers with 15 or more employees from committing discrimination in employment on the basis of an individual's race, color, religion, sex, or national origin, unless it is a bona fide occupational qualification (BFOQ), meaning a particular characteristic (religion, sex, or national origin) is absolutely necessary in order to perform the job, e.g., an actor must be male in order to play a male lead character in a movie. Title VII also prohibits employers from using selection practices that have a disproportionate and negative impact on a group of individuals because of race, color, religion, sex, or national origin.

The **Age Discrimination in Employment Act of 1967 (ADEA)** generally prohibits employers with 20 or more employees from discrimination in employment based on age, unless age is a BFOQ. Individuals age 40 and over are protected by this law.

The **Americans with Disabilities Act of 1990 (ADA)** generally prohibits employers with 15 or more employees from discrimination in employment based on disability. Employers must reasonably accommodate any otherwise qualified and disabled person, unless an undue hardship can be demonstrated. Undue hardship generally means that a reasonable accommodation would require significant difficulty or expense in light of the employer's financial resources, size, and/or location of operations, etc.

The **Federal Rehabilitation Act of 1973** prohibits the federal government from discriminating against qualified and disabled individuals in employment.

The **Equal Pay Act of 1963** generally prohibits all employers from using or implementing discriminatory pay practices on the basis of gender.

The **Family and Medical Leave Act of 1993** allows eligible employees to take up to 12 workweeks of leave, during any 12-month period, to care for a newly born or adopted child or a spouse, child, or parent (does not include parents-in-law) with a serious medical condition, or to attend to the employee's own serious medical condition.

**Occupational Safety and Health Administration (OSHA)**

OSHA's primary training goal is the long-term reduction of injury and illness among workers.

OSHA has many training requirements for specific operations, including hazard communication, bloodborne pathogens, materials handling, powered industrial trucks (forklifts), and personal protective equipment. Depending on the topic, OSHA specifies initial training requirements as well as a required schedule for refresher training. OSHA's General Industry regulations are primarily spelled out in the Code of Federal Regulations (CFR), specifically 29 CFR 1910.

**Department of Transportation (DOT)**

DOT requires all employees who handle or transport hazardous materials to receive three types of training: general awareness, function-specific, and safety. DOT regulations do not specify a delivery method or format for training.
Environmental Protection Agency (EPA)

EPA generally focuses its efforts on compliance rather than the training process used to achieve compliance. However, EPA has specific training requirements for asbestos, lead abatement, and certain other highly toxic or cancer-causing material-handling. In some cases, EPA specifies general types of training (e.g., classroom or hands-on) and time frames for refresher training, but leaves the duration of training and choice of training materials up to facility managers.

State Regulations

To further complicate your training requirements, states can mandate different or more stringent requirements than the federal agency in many areas. In most cases, employers are required to comply with whichever laws are more favorable to the employee.

What to Look for in Prepackaged Training Materials

Part of your needs analysis should include deciding how much to outsource. For example, determine what your training budget is and how it might best be spent. Once you’ve decided to purchase some of your training materials, you’ll need to choose with care. Here are recommended criteria you should use to evaluate products.

Classroom or Instructor-Led Training Materials

Many companies and organizations produce PowerPoint presentations, videos, DVDs, handouts, and other useful resources that can be purchased for delivering classroom training. How do you choose which products are the best for your needs? Check for these features:

- The materials cover all the regulations pertinent to your industry.
- They are easily customizable. They allow you to delete information that doesn’t apply to your company, for example, or add information such as your state’s regulations or your company’s specific policies and procedures. They allow you to place your company logo on materials—or do it for you before shipping.
- Their information is up-to-date and reflects the latest revisions or new preferred methods in the industry.
- They contain relevant illustrations to the subject and industry.
- They provide Certificates of Completion or other training verification that help you keep accurate records of who has completed required training.
- They provide easily accessible technical support for computer-related products.

Computer-Based Training

CBT products should have the features of classroom materials plus:

- They should have built-in interactivity—the more the better. Exercises, case studies, “You be the Judge” scenarios, or other activities test learning by requiring trainees to use what they’ve learned to make decisions.
They integrate quizzes and tests throughout the learning to guide trainees through the material at their own pace. For example, if trainees don’t get all the answers correct in a quiz, they need to repeat that section of the material before they go on to the next level to ensure they learn the materials.

They may contain scheduling software that enables trainers to electronically schedule trainees and set them up for training.

They may contain tracking software that enables trainers to track trainees’ progress, test scores, and completion rates. This software should be easy-to-use and adapt to help you maintain employees’ training records.

**Online or E-Learning**

Web-based training is basically CBT training administered and used over the Web, so use the same criteria when choosing Web-based materials that you use for CBT. In addition:

- Look for Web links to other Internet resources, such as industry groups or government sites, where trainees can go for further information.

- Ensure your in-house computers meet all the system requirements to receive the full benefits of the online multimedia components. You’ll need to verify both hardware and software compatibility.

- Ensure your company’s bandwidth is sufficient for one or multiple users to take online training.

- Look for an underlying learning management system (LMS) that enables you (or the training administrator) to merge the training scheduling with training tracking.

- Teleconferences and webinars, or Web meetings, also require your in-house computers to meet a minimum level of system and software requirements. Some vendors may require you to install specific software in order to access their Web broadcasts. These online conferences also require your Internet connection to be fast enough to receive the broadcast.

- In addition, you need to consider who is giving the presentation, what organization they represent, what their qualifications are, etc. Since these are the same criteria for choosing an outside trainer, refer to the next section in which we cover this training resource.

**Outside Consultants/Professional Trainers**

To choose the best outside trainer:

- **Evaluate several speakers, because there are many available for most topics.** You may want to have an evaluation committee to help you research and choose speakers. Look for the following information:
  
  — How many times per year does each contender speak in public?
  — How many times have they spoken to audiences in your particular field?
  — Do they have a portfolio with video samples of their work?
  — Have they published articles or books on the topic?
  — Are they members of professional training and/or industry organizations?
— What do previous clients say about them?
— Has the speaker been asked to return?
— Did the speaker provide a presession survey?
— What information is in their proposal? Read promotional materials thoroughly since speakers often offer their best tips in their portfolios. If you’ve heard it all before, they may not be the most up-to-date speakers you can find.

◆ **Consider using a speaker locator service to assist in the search and ensure results.** Unlike speakers’ bureaus, which represent a stable of speakers, speaker locator services work for their clients. The locator service identifies clients’ needs and searches for a speaker who most closely matches those needs. The service works similarly to a real estate agent, wherein the buyer is presented with options until an ideal match is found. The service is free to employers; speakers pay a commission to be in the locator’s database.

**Off-Site Conferences/Seminars**

Sending employees to conferences and seminars can be an excellent way for them to learn cutting-edge information as well as to find out what similarly placed employees in other organizations are thinking and doing. The obvious drawbacks are the cost and time away from work. But, in many cases, especially when there are only a few employees involved and there is a lack of in-house expertise in this area, the benefits of conferences and seminars may well be worth the costs. When choosing which conferences to attend, consider:

◆ Who is putting on or sponsoring the event
◆ How applicable the subject matter is to your company
◆ The qualifications of the presenter(s) or panel
◆ Any professional affiliations the conference or seminar may have
◆ Whether it’s a new conference or an annual or industry event
◆ Number of attendees expected to attend (will it provide a good chance for networking?)
◆ Location and cost of event, e.g., if it’s a multiday event, you may be able to attend (or have trainee(s) attend) only the day with sessions most relevant to your company

Now that you’ve analyzed your company’s training needs, decided which training methods to use, and selected in-house or outsourced training materials, it’s time to prepare for your training sessions.
Strategy #5: Prepare for Training

The major steps in preparing a training session include promoting the program to top management, preparing training materials, the training space, trainers, and trainees.

Promote Training to Management

Without top-level support, employees have less incentive to retain information and apply it to their work. When top management shows interest in the learning process, participants are more likely to apply new skills and knowledge to their work. Upper management’s influence on how employees react to training cannot be overestimated. Here are several ways to get your company’s top officers behind your training.

Talk Dollars and Cents

Here are statistics on the risks and costs of not training your employees to do their jobs safely and effectively:

- According to OSHA, 6,000 U.S. employees die each year from workplace injuries and another 50,000 die from illnesses caused by exposure to workplace hazards.
- According to OSHA, 6 million workers suffer nonfatal injuries every year at a cost to U.S. businesses of more than $125 billion.
- According to the Insurance Information Institute, workers’ compensation costs have risen an average of 50 percent nationwide since 2000.
- According to the National Council on Compensation Insurance (NCCI), total workers’ compensation costs per indemnity claim grew 85 percent from $9,100 in 1993 to $16,800 in 2003.
- According to NCCI, the average cost of a typical accident with a physical injury is $10,971 while safety training costs an average of $2,000 per session.
- In one recent year, OSHA’s federal inspections fined U.S. companies a total of more than $80 million for violations; state inspections in 26 states fined companies more than $70 million for violations.
- In one recent year, the Equal Employment Opportunity Commission (EEOC) received 14,396 charges of sexual harassment. Almost 15 percent of those charges were filed by males. EEOC resolved 15,792 sexual harassment charges and recovered $50.3 million in monetary benefits for charging parties and other aggrieved individuals (not including monetary benefits obtained through litigation).

All these numbers add up to a big expense for companies with poorly trained workforces. And they do not include the costs of lowered employee morale after co-workers are injured or killed on the job, or when harassment or discrimination lawsuits are filed or fines assessed against the company.

Well-structured, customized, and up-to-date training saves your company money.
In-House Trainers

Here are several reasons to maintain a qualified trainer or training staff.

In-house trainers:

+ Know the organization from the inside
+ Understand your goals and objectives
+ Have direct experience with jobs in your facility
+ Know what equipment, machines, and tools your facility uses
+ Can customize training to match your specific needs
+ Have a relationship with trainees
+ Can be more flexible with the training schedule when situations occur that need to take priority over training
+ Can conduct a broader range of training, including on-the-job, coaching, informal, etc.
+ Are available to follow up after training
+ Cost less

Conversely, the disadvantages of outside trainers are that they:

– Don’t know the employees or the operation from the inside
– May be costly
– May have scheduling problems (for example, arranging meetings with shift workers, employees in the field, etc.)
– Are usually not around afterward for follow-up

In short, be prepared to argue for and back up with numbers and facts whatever training methods you have determined to be the best way to keep your workforce trained and ready. This is the best way to get top management behind your efforts and willing to support a training mentality throughout the company. Their vocal and public support is critical to the success of your training program.

Prepare Training Materials

Preparing training materials in-house is more laborious than using prepackaged materials, but if done right, it only has to be done once. With a logically organized filing and storage system, you will have training sessions that are reusable and easy to update as equipment or procedures change. And you will have complete control over what is trained in your company.

Writing training materials requires several steps:

1. **Specify training goals and objectives.** List your objectives and refer to them often as you prepare subject matter so that you keep on message and achieve your training goals. For example, listed goals for a back injury training program could include:
   • Teach trainees safe lifting techniques.
   • Provide trainees with a greater understanding of how the discs function in relation to the vertebra.
◆ Provide trainees with information about strains and sprains and how they relate to back injuries.

◆ Provide trainees with hands-on, supervisor-monitored opportunities to practice correct lifting methods.

2. **Present subject matter in a logical order.** Explain the basics of the topic—and make sure trainees understand them—before going on to more detailed and technical information.

3. **Emphasize the most important points.** What facts or practices do trainees absolutely need to have or need to know how to do? Plan to spend most of your training time on these. Allocate less time to less important but still pertinent training points.

4. **Customize training materials to your company’s situation.** Relate information to your company’s policies, procedures, tools, equipment, machines, personal protective equipment, etc. Update this section as tools or equipment is replaced or procedures are changed.

5. **Incorporate interactive methods into your training.** Find ways to keep trainees involved.

6. **Write a training session plan.** Some plans may be less detailed than others depending on the subject matter, but a plan should be written for every training session. Why?

   ◆ Written plans help ensure that all required information is presented.

   ◆ They document what is covered.

   ◆ They provide a library of customized training materials for your company’s training program. By retaining every plan in your training files, you make sure that no matter who does training, they will cover the objectives and goals that you have indicated need to be covered.

7. **Plan for a question-and-answer session.** Compose a list of potential questions and prepare answers. Sometimes planned material turns out to be only half the session. Good information is often passed both ways through Q&A sessions—trainees can clarify points or make trainers aware of current practices that may need updating; trainers can use this interactive method as a good indicator of how well trainees understand the material.

**Prepare Training Space**

The need for proper preparation cannot be overstated. Trainees will gather first impressions in the first few minutes of the session, and they will judge the material and the trainer on how prepared the training environment is. Even if your training space is a cordoned off part of the plant, cafeteria, or other work area, you need to get it ready for training. For example, make sure the area will accommodate the number of trainees for the session. If trainees have to stand or if they are packed uncomfortably tight, they will not be as receptive as possible to the material you present.

Prepare training areas by checking for:

◆ Adequate seating arrangements

◆ Comfortable environmental conditions
◆ Sufficient lighting
◆ Required equipment, such as video player/monitor, slide projectors, flip charts, and other media

Make sure you have enough handouts or other materials for trainees. Ensure tools, equipment, machines, or other props for demonstration or practice are working properly.

As the person in charge of training, it's up to you to develop standard preparation procedures to ensure a high standard of training. Every detail counts.

**Prepare Yourself**

Each trainer has different qualifications, experience, expertise, and methodology of training. Even trainers who are intimately familiar with a subject must properly prepare for the training session.

Since practice makes perfect, practice your presentation as much as possible. The best instructors always do at least one dry run before the training session. Practicing improves presentation skills and confidence levels. It allows trainers to foresee any technical or logistical difficulties and prepare back-up plans for any contingencies.

Many people are uncomfortable with public speaking even when they have a well-prepared presentation. Here’s a two-step process for overcoming stage fright:

1. **Prepare your mind by putting everything in perspective.** Trainees are here to learn from you; they want you to be a good trainer, because they’ll learn more that way. Focus on them and making sure they understand the material. Don’t worry about your performance, you’re just the messenger. Deliver the message. Accept the fact that you will be nervous and, in fact, put that nervous energy into an energetic delivery.

2. **Prepare your body.** Trainers need to familiarize themselves with the training environment, including the lighting, temperature, and layout of the classroom. You can do this during your practice session and also by arriving early on the day of training to check that everything is in order. Drink nondairy fluids to soothe your vocal cords and prevent a dry or sore throat from extensive talking during the session. You may also want to learn relaxation techniques and develop a standard ritual before training sessions to relax and prepare yourself.

**Prepare Trainees**

To ensure the most productive training session, you also need to prepare trainees so that they are highly motivated before they walk through the training doors. Use these pretraining techniques to put trainees in a receptive frame of mind, get them geared up for the topic, and prepare them to learn.

◆ **Distribute a session outline or agenda before the meeting.** Trainees who might be anxious about training will be put at ease when they know ahead of time what will be covered. And since knowledge is power, all trainees benefit from knowing what’s on the agenda. You benefit when trainees enter the room already thinking about the topic.
• **Distribute presession activities.** Along with the outline, include fun and simple open-ended questions or situations, such as these:
  
  —General questions:
  1. What do you already know about the training topic?
  2. Why do you think this training is needed?
  3. How will this training benefit you and the company?

  —Case studies involving the upcoming training followed by debriefing questions:
  1. In this case, what would you do?
  2. What would you have done differently from the characters?

  Ask trainees to be prepared for a brief class discussion on the case study. Take a few minutes at the beginning of the session to ask trainees for their answers.

• **Distribute an expectation questionnaire.** Via survey, e-mail, group meeting, etc., ask what trainees expect from the session. Use the results to customize the session as much as possible to the audience while still meeting all training objectives.

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**Strategy #6: Conduct an Effective Training Session**

Everything and everyone is as prepared as possible for training. You know your training needs, you’ve set goals, gotten management behind you, promoted your training schedule, and prepared materials, space, and people. It’s time to get the show on the road!

**The 12-Step Method for Successful Training**

Follow these 12 steps to help you run an effective training session that accomplishes your goals in an enjoyable and engaging way for everyone involved.

1. **Tell trainees what you’re going to cover.** Introduce your session with a brief overview of the training subject’s main points.
2. **Give them the information.** In the main portion of the session, explain key points, go over policies, demonstrate procedures, and relate any other information trainees need to know.
3. **Tell them what you told them.** Conclude with a summary of your opening overview. Use repetition to help trainees grasp and retain information.
4. **Always explain what trainees are going to see before you show a multimedia portion.** This practice creates a better learning environment by guiding trainees to know what to look for and what to remember. Explaining the purpose of the multimedia ensures an effective reception for its information.
5. **Use as much hands-on training as possible.** The most effective training uses all the senses to affect learning. Demonstrate and apply teaching points to create greater understanding and knowledge of the subject.

6. **Test frequently.** Tests are most effective when students know they will be quizzed, because they’ll pay close attention to the material. Testing is an objective way to determine whether training achieved its goals.

7. **Involve trainees.** For example, ask participants to share their experiences with the training topic. Many trainees are experienced personnel who have valuable information to contribute. All trainees will get more out of sessions by hearing about their co-workers’ experiences with the subject—and not just the trainer’s lecture points. Hearing different voices also keeps sessions varied and interesting. Structure interaction time into all your sessions.

8. **Repeat questions before answering them.** This practice ensures that all participants know what the question is so they can make sense of the answer.

9. **Analyze the session as you go.** Always be on the lookout for what works best. When you discover a new technique or method that clicks with the group, note it on your training materials so it can be incorporated into the training outline to be used in future sessions.

10. **Keep your session on track.** Start on time and finish on time. Don’t hold up class waiting for late arrivals. Run the class according to the schedule and don’t get too far off course. Opening up discussion among participants may lead to some pertinent tangents, but don’t let side issues take over. Ask if there’s enough interest to pursue a separate session on that topic, but get this class back to the lesson plan.

11. **Put yourself in their shoes—or seats.** Give frequent breaks, especially for half-day or all-day sessions.

12. **Solicit feedback on the training session.** Critiques work best when they are written and anonymous, unless a trainee volunteers to discuss his or her thoughts in person. Trainee input is vital for making the next session—and the overall training program—more effective.

These 12 steps are the basic foundation for a solid training session that runs efficiently and that conveys the necessary information for meeting the session’s goals. They also incorporate ways to begin improving training on the fly. In other words, you can’t go wrong by following these steps in every training session you run.

It is possible, however, to get a little more creative—and memorable—by using some of the following innovative techniques.

**Make Training Memorable**

Here are some softer training methods that are not necessarily essential to conveying information, but that can make receiving data or instructions a much more enjoyable experience, which will keep trainees involved and help them retain more information.
- **Make learning fun.** Why? Trainees will not be enthusiastic if training sessions are dry and dull. Few employees respond to or remember complicated concepts or theories; they want to learn practical information about what they can do to get better results today. If they don’t find the message entertaining, they won’t retain it. Since variety is the spice of life, use several different training methods to engage trainees in a variety of ways. Also work to alternate the pace of each session to keep trainees’ interest level high.

- **Use humor.** Humor helps keep enthusiasm at peak levels. Trainers can make a point more effectively by using humor than by drowning trainees in statistics or theories. Avoid telling jokes, however, because humor is so subjective that someone in your audience may be offended and lose track of training for the rest of the session. Personal, self-deprecating humor is the safest way to go.

- **Use attractive packaging.** Use materials that are well-packaged and that communicate value. Professional packaging is a powerful tool for setting a good first impression.

- **Encourage participation.** Make the session lively by engaging participants in the learning process. In fact, try to spend close to 80 percent of training time on group participation. Encourage everyone in the training session to speak freely and candidly, because learning occurs most readily when feelings are involved.

- **Build self-esteem.** Employees understandably want to know what’s in it for them. They know that most training programs are designed to make money for the company, but rarely does training lift employees’ spirits or help them to become better in their own lives. Create a win-win environment by using the training program to build the participants’ self-worth and self-esteem.

These are all effective techniques for running a successful session, but what kind of person does it take to do the training? The best trainers have several qualities that make them good at what they do. Check the list below to see which qualities you already possess—and to determine which areas you could improve.

### Qualities of Effective Trainers

While some of these qualities are obviously necessary for anyone in a teaching position, others may not seem as necessary, such as being patient or open-minded. All of these attributes, however, contribute to making top-notch trainers. All the best trainers are:

- **Good communicators.** They speak well, express their thoughts clearly, and have an engaging presentation style.

- **Knowledgeable.** They know their topic cold. They understand all the concepts and know all the details. They can answer questions thoroughly and at a level that trainees understand. If they ever can’t answer a question, they know exactly where to go to get that answer and they promise to do so as soon as possible.

- **Experienced.** They know what they’re talking about. They’ve been in the field doing what they teach in training.
◆ **Good with people.** Their personality styles may vary, but they enjoy working with people. They can engage groups of people and work with them to meet training goals.

◆ **Interested in learning.** They recognize the value of learning in their own lives and want to help others learn. They find satisfaction in sharing with others the skills and knowledge they have acquired through hard work and persistence.

◆ **Patient.** They understand that people learn in different ways and at different paces. They take the time to make sure each trainee understands what's going on and leaves training sessions with the skills and knowledge he or she came to acquire.

◆ **Open-minded.** They respect other people's points of view and know that there are often many ways to achieve the same objectives. They don't assume they know everything, but instead are willing to listen to and learn from trainees.

◆ **Creative.** They bring ingenuity and their own natural curiosity to the task of training. They create an environment in their training sessions that encourages learning and inspires trainees to reach beyond what they already know to explore new ideas and methods.

◆ **Well-prepared.** They know their material, their objectives, and their plan of presentation. They've checked to see that any equipment they expect to use in training is in place and operational. They've made sure that all supplies and supporting materials are available in the right quantities.

◆ **Flexible.** They are able to adjust their training plan to accommodate their audience and still meet all training objectives.

◆ **Well-organized.** Good trainers can handle several tasks at once. They know how to manage their time and their work.

**Training Pitfalls**

In an ideal world, training will always be successful. There are ways that training can go wrong, however, and forewarned is forearmed. This section alerts you to several training pitfalls—and gives you ways to avoid them.

According to a 2001 strategic planning workshop on human capital sponsored by the National Institute of Environmental Health Sciences's (NIEHS) Worker Education and Training Program (WETP), there are several possible problems that can lead to either trainer burnout and/or a less-than-successful training program. Here's what can go wrong, along with ways to make it right:

**How Trainers Develop Burnout**

◆ They get in a rut by always training the same topic.

◆ They get in a rut by always using the same training methods.

◆ They are discouraged because of management's lack of support.

◆ Their hands are tied by an inadequate budget.

◆ They do not receive ongoing train-the-trainer instruction.
They do not receive proper materials or instruction for training across language barriers or cultural differences.

They do not get into the field enough to customize their training beyond book learning.

**How to Keep Trainers Fresh**

- Rotate trainers onto different topics.
- Encourage using a variety of training methods.
- Promote your program to management and get their verbal and public support; ask management to personally encourage trainers.
- Present a realistic and ambitious budget that provides for all your training needs.
- Encourage and provide for ongoing training and career development for trainers.
- Assess your training audience ahead of time and provide trainers with language-appropriate materials and cross-cultural information.
- Arrange for trainers to visit the operations in which they train on a regular basis to keep current on new methods.

**Why Training Programs Fail**

- No training goals are set.
- Training goals are not in line with company goals.
- No accountability measurements are set up for trainers or trainees.
- Training is regarded as a one-time event and not as an ongoing need.
- Little or no support is given from upper management.

**How to Make Your Training Program Succeed**

- Set specific training goals with a committee that includes top management.
- Align training goals directly with the company's strategic and financial goals.
- Set up an accountability system to measure the effectiveness of trainers and trainees; determine whether trainers successfully communicate information and whether trainees successfully apply what they've learned to improve their job performance.
- Design a training schedule that includes ongoing training, such as beginner, intermediate, and advanced as well as refresher training. Incorporate this calendar into the company's calendar of holidays and other company events.
- Always have a representative from upper management on your training committee to ensure that training is an integral part of your company's present and future plans for success.

Congratulations! You've now planned, prepared for, and run a training session and program. Now it's time to find out how you did.
Strategy #7: Ensure Your Training Is Effective

The training session is over and trainees have returned to their jobs to begin applying what they’ve learned, so the trainer’s job is done, right? Wrong.

A successful training program is always a work in progress, and the training cycle isn’t complete without an evaluation of training’s effectiveness, which leads to decision-making and planning for future training. Therefore, a useful and informative evaluation program needs to be part of your overall training operation.

To begin with, what should you be looking for in your evaluations?

- Was training delivered as planned, on time, and to the appointed audience?
- Which training methods worked with which topics and which audience groups?
- Which methods did not work with which topics or audiences?
- What specific problems occurred?
- How effective was the trainer at engaging the audience and conveying information?
- How did the training affect employee performance?
- Did the training satisfy regulatory and legal requirements?
- Were all stated goals reached? If not, why not?

This is a lot of information to gather; fortunately, there are many methods and tools available to help you.

Kirkpatrick’s Four-Level Model of Evaluation

Donald Kirkpatrick, author of many books, such as Evaluating Training Programs: The Four Levels and Another Look at Evaluating Training Programs, created a four-level evaluation system more than 40 years ago, which has stood the test of time and continues to be utilized in training programs today. Here are Kirkpatrick’s four levels of evaluation.

Level I: Reaction

Kirkpatrick’s first level evaluates how well participants liked the training session. If you’re interested in running the best training program possible, you want participants to be motivated for and engaged with training. This exercise gives trainees the opportunity to give feedback to the trainer on the pros and cons of the session, which is valuable information that shows trainers specific areas to improve.

Follow these tips when obtaining feedback on trainees’ reactions:

- Observe trainees during the session for your own perception of their reception.
- Get trainee feedback in writing immediately following the session.
Use measurable and meaningful terms.
Use uniform feedback forms so results can be quantified and tabulated for the whole group.

**Level II: Learning**

This level measures how much of the desired principles, techniques, and skills trainees learned in the training session. In order to determine what trainees learn during a session, you need to know what they knew before training.

Follow these suggestions for measuring learning:
- Use pre- and post-knowledge and/or skills testing.
- Use objective measurements to assess what trainees now know or can do that they didn’t know or couldn’t do before training.
- Use a control group of employees who did not attend the training session to compare their performance to employees who received training.

**Level III: Behavior**

The third level measures employee behavior changes based on training. Your goal is to see how well trainees incorporate learned principles, skills, and knowledge into their jobs on a permanent basis—or at least until they learn a new and better way to perform.

Follow these methods for evaluating behavior:
- Solicit the help of trainers, supervisors, and others who work closely with trainees to observe these employees before and after training, and to give their measurable, objective feedback on performance.
- Continue observations for 3 to 4 months after the training session, so you can get an accurate assessment of whether trainees have made permanent performance improvements based on training.

**Level IV: Results**

Kirkpatrick’s first three levels focus on trainees and the effect of training on their performance.

The last level in Kirkpatrick’s evaluation model focuses on the results of training on the company in terms of:
- Reduction of costs
- Reduction of turnover and absenteeism
- Reduction of grievances
- Increase in quality
- Increase in quantity or production
- Improved morale
Follow these suggestions for measuring the results of training on the company's overall performance:

- Measure statistics in each of the categories listed above (or whichever categories you included in your goal-setting) before and after training.
- Use a control group, if possible, for comparison.
- Measure more than once over several months to allow time for changes from training to affect the areas you listed.

**Evaluation by Return on Investment (ROI) Analysis (or the Fifth Level of Evaluation)**

Some training professionals consider ROI analysis to be one method for determining the results of Kirkpatrick's fourth level of evaluation. Others consider ROI its own level and make it the fifth level of evaluation. In any case, this method is an effective way of measuring the success of your training program.

ROI analysis gives the trainer data about the financial impact training programs have on the organization. It differs from Level IV evaluation in the sense that Level IV takes into consideration nonfinancial data such as employee satisfaction. ROI analysis deals strictly with the financial impact of training. It answers the question “For every dollar invested in training, how many dollars does the employer get back?”

Here are three great reasons to use ROI analysis:

1. It's a concrete way to validate your training program as a business tool.
2. It can be used to justify the cost of your training program to upper management.
3. It can be a useful tool for choosing future training methods.

Many business executives view training as a business expense and, therefore, measure its worth in terms of profits made or savings earned from this expense. You need to make sure training is seen as beneficial to your company. Use the following formula when measuring the ROI for your company to get the percentage of profit earned for every training dollar spent.

**ROI Formula:**

\[
ROI (\%) = \frac{\text{Monetary Benefits} - \text{Training Costs} \times 100}{\text{Costs}}
\]

To get the figures for this formula, keep track of training costs, including:

- Design and development
- Promotion
- Administration
- Delivery (staff or technology)
- Materials
- Facilities
- Employee wages
- Evaluation

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After training, keep track of monetary benefits, including:

- Labor savings
- Productivity increases
- Income generation
- New leads
- New products
- Lower turnover costs

ROI Analysis is fast becoming an essential level of evaluation for companies who invest in training.

**Standardized Tests**

Tests can be used for collecting information at all five levels of evaluation. They can be given before training, during training, and after training. There are several types of tests from which to choose.

**True-False**

When designing true-false tests, keep these factors in mind:

- **Write statements that are clearly true** or clearly false.
- **Take statements used in training and rephrase** them slightly.
- **Avoid words that tip trainees to the answer**, such as “may” or “generally” for true statements, or “always” or “never” for false statements.
- **Avoid double negatives**, which make statements unnecessarily confusing.
- **Remember that you’re not trying to stump trainees**, you’re trying to make sure they learned the material.

**Multiple Choice**

These tests may be the most popular with trainees, but they can be the hardest to write for trainers. Follow these suggestions when designing multiple choice tests:

- **Cover one topic per question.**
- **Include only one right answer.** Of course, you want all the choices to seem right, but make sure you don’t get so close to right that someone might have a valid argument as to their choice being correct.
- **If space allows, use more than three choices.** Remember, the more choices you have, the less guessing is involved, e.g., four choices means a guess rate of 25 percent, five choices means 20 percent.
- **Avoid always making the right answer the longest choice.**
- **Avoid making the right answer choice “C” very often.** This practice thwarts seasoned multiple choice test takers, who know the ditty, “when in doubt, guess ‘C.’” One way to achieve randomness is to list answers in alphabetical order.
- **Avoid giving a grammatical clue in your question,** such as using “a” with only one answer beginning with a consonant or “an” with only one answer beginning with a vowel.
Limit your use of “all of the above” (and “none of the above”). But if you use it for one question, you must use it for at least one more, or trainees will take a clue that it’s probably the right choice for the only question where you included it.

Matching

This type of test is used less often but can be fun for the trainee and much easier to design for trainers. Here’s how to write a matching quiz:

- **Cover one topic per matching exercise.** For example, one test could match a list of chemicals with a list of personal protective equipment the chemical requires. A separate test could match a list of chemical regulations with a list of quotations from those regs. Or one test could match a list of employment laws with a list of the rights they protect and another test could list employment law acronyms with a list of their full names.

- **Limit the number of items to around 10.** Fewer than 8 can be too easy and more than 12 can get too confusing.

- **Lay out the test on one page** so trainees don’t have to flip back and forth.

- **Make the items in each list brief.** Use names, objects, tools, agencies, etc. Avoid making an item longer than one sentence.

Fill in the Blank

These tests can be tricky to write, but they prove that trainees learned the information because they have to produce the right answer without seeing it on the page as in any of the previous tests mentioned. Follow these tips for composing fill in the blank questions:

- **Use only one blank per question.** Too many blanks don’t give trainees enough information to even grasp the topic.

- **Limit the blanks to specific information,** such as regulation titles or government agencies, etc. Make the nouns or verbs in a sentence the blank lines, not the adjectives or adverbs.

- **Word statements so that there can be only one answer** that correctly fills in the blank.

- **Place blanks later in the sentence,** which helps give trainees the context of the topic.

- **Avoid grammatical clues immediately preceding the blank,** such as “a” or “an.”

Other Evaluation Methods

Some other evaluation methods include first-hand observation and production data analysis. You can use observation both in the classroom to monitor trainees as they practice new skills and later on in the job to see how they’re incorporating training into their performance. Your goal is to see how well the trainee learned the skill. You can develop a rating scale or simply make comments.
Use production data analysis by keeping track of production quotas and other data before and after training. Compare the results to see measurable ways training improved job performance. Make sure you take into account variables other than training that could have affected performance when you look at these numbers.

**Transferring Learning to Work**

In order to ensure your training has been effective, you need to do more than evaluate. You also need to take post-training time to help trainees transfer new skills and knowledge to the workplace—and to make these changes stick. You may need to help employees overcome certain obstacles to applying training to the job.

**Obstacles to the Transfer**

Here are common obstacles employees may encounter:

- **Learners can be set in their ways** and reluctant to embrace change.
- **Upper management may not offer enough support** either in terms of morale or materials.
- **Learners may lack enough motivation** or incentive.
- **Learners may not have enough time to practice** new skills and achieve a comfort level.
- **Co-workers may apply peer pressure** against changing methods.

**How to Avoid Obstacles**

Here’s how you can help trainees avoid obstacles to transferring what they’ve learned to their jobs:

- **Give your personal support.** A few weeks after the training program, send trainees a note or e-mail, or give them a call. Ask questions like these to their jobs:
  - How is what you learned affecting your work?
  - Are you having any problems or concerns?
  - Do you have any final comments or suggestions about the learning experience?
- **Make your support ongoing.** Have an open-door policy with employees so they know they can talk with you at any point about any issues that come up as they transfer learning to the job.
- **Establish group support.** At the end of training sessions, assign trainees to small groups that will meet regularly for a while after training. Participants can use these groups to discuss common problems and concerns, how they are doing in applying the new skills, and to perform practice sessions. Group support gives members a sense of unity and security, which they can fall back on when they run into problems.
- **Compose checklists or cheat sheets.** Give these out at training sessions for employees to take with them back to work and refer to as needed. These are especially helpful for new procedures or new steps in existing procedures.
- **Set up a coaching program.** Coaches can be trainers, qualified experienced employees, or members of upper management. The point to this method is to have someone on call to answer questions, give feedback, give support, and to be a role model for proper behavior.
Investing in human capital is a wise decision for every organization. Training makes better employees, and better employees make better companies. Keep in mind training is much more than a one-time event as long as methods and technologies keep changing the way we work. For companies to stay competitive, they must invest in their employees by turning them into lifelong learners.

Follow the strategies outlined in this special report to design and run an effective training program that will motivate and train your workforce to be the best in the industry—and that will have positive effects on every department in your company.

**Strategy #1**—Make training a top priority at all levels of the company.

**Strategy #2**—Develop a training program that meets training needs and is customized to your company and its employees.

**Strategy #3**—Choose the right training techniques for your training topics.

**Strategy #4**—Decide when and how to outsource some of your training needs.

**Strategy #5**—Prepare people, places, and things for your training sessions.

**Strategy #6**—Conduct effective training sessions with a sound presentation that incorporates engaging activities.

**Strategy #7**—Evaluate training at every level.

Also, assist trainees as they transfer learned skills and behavior into their work. With these strategies in hand, you’re now ready to build an effective training program.
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