

# SO, YOU WANT TO BE A TRAINER!

## INDIVIDUAL LEARNING GUIDE



This individual learning guide outline is your tool for developing a variety of techniques and methodologies which you can use to effectively train adult occupational learners at you location, or as paying participants should you decide at some point to venture out into the corporate world as a freelance company trainer.



Compiled by Al Barrs

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# PREFACE

Welcome to the *So, You Want To Be A Trainer self-development series* and to the world of training delivery. The training and development of one's self is one of the most important functions an individual can aspire to. Your attitude, conduct and decisions will determine the level of competency and quality of the training you will provide to your valued workers and managers.

As a self-motivated training leader you will be responsible for planning, training, developing, evaluating and records keeping of the people you train.

As the person responsible for the training of workers and managers, after completing your self-learning program you will want to expand your knowledge and skill in training delivery methods. You will also want to learn something about the jobs and tasks of the occupational areas at your location. You can do that by questioning the most successful workers and managers in the organization. To do this determine the jobs within an occupation and then identify the tasks required to master each of the jobs within the occupation. You can develop what I term a Learning Map of the jobs and related tasks participants must master in order to become a successfully practitioner of the occupation.

You will want to become more proficient at training, evaluating and maintaining personnel training progress and completion records. You will want to provide training leadership at you location. Therefore, it is important that you gain additional skills in both training delivery and leadership.

While on site, you will work closely with location supervisors and managers, and you should expect to become a mentor to those who attend your training sessions.

In this effort to aid your development as a successfully trainer we have published this assortment of self-study materials which you may want to retain as an information resource during future training opportunities. We have included a resource section in the back of this module should you have a desire to continue your development as a trainer and human resource development leader.

Good luck!

Al Barrs

# INTRODUCTION

## IMPORTANT TRAINING DELIVERY TIPS

### **Motivate Learners**

To ensure that participants are motivated to learn they must have interest, a sense of success, a positive climate and cooperative attitude. And, they must bring a positive attitude to your training sessions. Attitude is the one thing that a trainer can not teach. It is what the participant brings to your training session. However, a poor attitude will hinder the ability of the participant to learn and expand their knowledge and skill.

### **Interest**

Be sure that participants know what they are going to achieve during the total activity, the learning objective. Use descriptive terms to write learning objectives. All learning objectives must be measurable. To write descriptive learning objectives use action words or active verbs in the writing of learning objectives. Be sure that participants know that the positive results of their effort will be reflected in the quality of their jobs.

Have participants discuss their goals and objectives for learning the training you provide. Each participant will have different reasons for participating. As the trainer, you should know what these are and help them achieve their own particular goals and objective.

Encourage a two-way communications format. Interest is generated by involvement. The participants must not be detached from the learning activity. They must perform and you must react.

Use strategies that create interest. Be creative about presenting materials in a way that gets participant's attention. You can do this by varying your activities, using visual, tactile and verbal queues.

### **Success**

Always give participants the chance to exchange ideas and make suggestions.

Be very certain that the training skills are neither too difficult or simple for the participants.

Identify the successes already realized. Be sure to review the status of each participant. Reinforce the achievements and the resultant impact on their jobs. Help them to evaluate their own success and instill a sense of accomplishment, progress and pride in their personal achievements.

Actively help participants learn. You are their most important resource. Work together with participants to achieve their goals.

### **Positive Climate**

Do what you can to support interpersonal relationships. People learn well when they learn together. Maintain a positive and friendly climate during training sessions and afterward.

Ensure that the training space is organized and set-up well before the participants arrive. Spend time before training chatting and connecting with participants. A friend is easier to train than an enemy.

Be a positive and energetic example to participants. Since you carry information with you as a trainer, you play an important role in shaping participants perspectives.

### **Ask Good Questions**

Always ask probing questions. Remember, you are there to facilitate learning, not to broadcast information. If you have just presented information to participants you are only just beginning and they will only retain about ten percent of what you say. They must still process the information and convert it to performance tasks. Their participation and your response are critical to the learning process.

Make a habit of asking questions that cannot be answered with a "yes" or "no". Strive to ask questions that begin with "Who. . , What. . , Where. . , When. . , Why. . , and How."

Ask everyone questions. To get involvement, re-direct questions asked of you to other group members.

Be patient and wait for responses. People need time to think processes through. If you consistently allow enough time, participants will give proper consideration to your questions. Do not be too quick to rephrase questions. Let participant's mind work.

Construct a valuable response to questions. If an answer is correct, be sure that the learner understands their success and progress. Reward them...give at-a-boys and congratulations on correct answer responses.

### **Support Good Discussions**

To prepare for the discussion, you the trainer should determine where you want the discussion to lead and what the participants are likely to feel about the topics.

The trainer should prepare introductory remarks and the background information for the discussion topic well before the training session begins.

# USE ORAL QUESTIONING

## Learning Experience I

### OVERVIEW

After completing the required reading, demonstrate knowledge of the techniques and procedures involved in effective oral questioning.

You will be reading the information sheet, *Employ Oral Questioning Techniques*.

You will be demonstrating knowledge of the techniques and procedures involved in effective oral questioning by completing the Self-Check.

You will be evaluating your competency level by comparing your completed Self-Check with the Model Answers.

### Activity

For information concerning (1) the purposes, limitations, characteristics of oral questioning and (2) the techniques involved in employing oral questioning read the following information.

### EMPLOY ORAL QUESTIONING TECHNIQUES

“To question **well** is to train well.” Socrates would have agreed with this statement. He used questioning to the exclusion of all other methods. In training today however, we recognize that oral questioning is but one of several important methods you can use to be a successful trainer.

### Advantages

Oral questioning is an effective way to stimulate trainee **motivation** and solicit **participation**. Questioning provides for involvement of **all** trainees. In addition, it focuses trainee attention and develops interest and curiosity. The effective use of oral questioning techniques provides trainees with opportunities to practice **self-expression**. At the same time, it allows **variety** to be added to the lesson.

Logically sequenced questions can stimulate logical and critical **thinking** and serve as a guide to **reasoning**. Also, use of questions directed at different levels of knowledge can lead trainees into the different levels of thinking. An important outcome of using questions is that the **special abilities and interests** of individual trainees can be discovered. Trainees often acquire special knowledge and skills through hobbies, work experience, or family activities. You can use these special abilities and interests as an additional training resource to promote employee learning.

Oral questioning techniques can be used for a variety of purposes, as follows:

1. To introduce, summarize, or review a lesson
2. To clarify points previously made
3. To bring up points omitted
4. To bring reading assignments into focus
5. To develop, in trainees, new insights

6. To promote trainees understanding
7. To develop trainees' attitudes and values
8. To teach trainees to **use** ideas rather than to simply memorize them

Oral questioning can provide important **evaluation information**. Trainees' preparation for the lesson can be tested. (e.g., through questioning, you can determine if they read and understood an assignment). Questions during the lesson's introduction can serve as a pretest of trainees' knowledge level. Also, using questions during the lesson can provide immediate feedback on how well trainees are progressing.

Incorporating questions in the lesson summary and review can provide at least a partial evaluation of the extent to which the program goals have been achieved by trainees.

### **Limitations**

The use of oral questioning has some limitations. Questions directed at large groups may be **difficult to hear**. The same is true of trainee responses. One way to overcome this difficulty is to repeat the questions and responses that may not have been heard by all persons. However, large group training is discouraged. In addition, questioning involves considerable training **time** as compared to other techniques requiring less trainee involvement.

The individual characteristics of trainees can also affect the success of oral questioning. Shy trainees are sometimes **reluctant to participate** in question-and-answer sessions. Your role in providing a secure, non-critical learning environment is important here. If the shy trainee is made to feel comfortable and un-threatened, He/She may be more willing to participate. There also may be a tendency for a small group of trainees to **dominate** the discussion. This can be prevented by distributing the questions among all trainees.

### **Characteristics of Good Questions**

Trainee learning can be greatly stimulated by the use of oral questioning techniques. In addition, use of these techniques can provide you with continual feedback as the lesson is being taught.

However, any advantages that may result from the use of oral questioning may be destroyed if good questions are not asked. You should carefully plan your questions and should write them down in your lesson plan. This planning, however, should not be so rigid that it does not allow you to ask spontaneous questions in response to trainee interest.

A good question should have the following characteristics:

1. Concise, including only one idea
2. Short enough for trainees to remember
3. Timely, interesting, thought provoking, and relevant to the lesson being taught
4. Stated in language familiar to trainees (a question is not the place to introduce new terms)
5. Stated to stress the key points of a major lesson topic
6. Stated to require more than a guessing response
7. Stated to require more than a simple "yes" or "no" answer
8. Stated in such a way that it does not suggest the answer

## Types and Levels of Questions

Questions can be classified according to the level of knowledge required for the correct response. Each level is progressively more complex and each is built on all levels below it. Beginning with the lowest level the levels are as follows.

**1. Knowledge:** At the knowledge level, trainees are asked only to recall or recognize the correct response from memory; for example:

- What is the formula for computing...?
- What is the definition of...?
- What are the main parts of a business letter?
- What are the four ingredients used to make...?

In general, questions requiring a simple “yes” or “no” answer should be used sparingly. With such questions, trainees have a 50:50 chance of guessing the correct response; their actual **knowledge** isn't necessarily tested.

Simple recall questions can be used in introducing a lesson. Or, a recall question can be used as the first question in a series of questions that progress to a higher level of difficulty. In addition, in situations in which a trainee gives an incorrect response to a higher-level question, you may lead the trainee logically to the correct response by asking simpler questions and thus reviewing the information necessary to answer the initial question.

**2. Comprehension:** Three sublevels of knowledge are involved in comprehension as follows:

a. **Translation** - The translation sublevel involves asking trainees to transfer knowledge from one set of symbols to another: for example:

- State in your own words the definition of merchandising given in our learning guide.
- Paraphrase the directions for mixing ... given in the bulletin.
- Draw a picture to illustrate...

b. **Interpretation** - The interpretation sublevel involves asking trainees to explain the meaning of something; for example:

- What does the graph show to be the point of diminishing returns?
- What does the table show would be the curing time for...?
- What trends are shown by the... for the past ten years?

c. **Extrapolation**- The extrapolation sublevel requires trainees (1) to infer, project, or extend from known information into an area that is not known or experienced, or (2) to extend the meaning of major ideas beyond the limits of the information presented; for example:

- What is the general need for..., based on our study of the present supply?
- Considering the properties and price of the new..., what would you predict would be the uses that will be made of...?
- What will be the trend in job opportunities for..., given the general forecasts in the Occupational Outlook Handbook?
- Use your knowledge about... to predict the relative time required to create each of the basic...

**3. Application:** The application level requires trainees to solve practical problems through the selection and use of ideas, principles, and theories (i.e., to apply what they have learned to particular situations); for example:

- Use the principles of... to explain how a... works.
- Use your knowledge of... to explain how... can be made.



- Using your knowledge of what makes a good... for..., explain what ratio and rate per... you would suggest.

4. **Analysis:** At the analysis level, trainees are asked to break a whole down into its component parts and to determine the relationship between the parts; for example:

- Which of the statements in the article on... design are inconsistent?
- What is causing the... we have tested for malfunctions to fail?
- What relationships exist among the different... used to make...?

5. **Synthesis:** The synthesis level requires trainees to put together parts and elements to form a new whole or pattern (i. e., to use concepts, principles, or ideas already learned to make a new product); for example:

- What overall... plan will meet the needs identified in the... survey?
- What type of management plan is needed to profitably integrate all the...?
- Using current prices of different..., what would be the cost for a 1,000-pound load?

6. **Evaluation:** The evaluation level requires trainees to make judgments based on specific criteria rather than opinions; for example:

- Applying the criteria provided, which of the three plans would be most effective?
- How would you evaluate the proposed management plan, using the profit available?
- Given the following criteria, how would you judge and rank each of the ten...?

Oral questions at the analysis, synthesis and evaluation levels can be used very effectively to summarize training activities. Questions at these levels also may be used to guide trainees in study assignments and problem-solving activities.

The levels of questions provide guidance in developing a logical sequence of questions. Because each level is based on all levels below it, you can plan the sequence by moving from lower-level to higher-level questions. For example, the application level is based on the knowledge and comprehension levels. Thus, the questioning sequence would start with a question at the knowledge level, followed by a question at the comprehension level, and then a question at the application level.

One final comment should be made on levels of questions. The focus of this module is on the effective uses of oral questioning as a training technique. Although you need to be able to recognize and write questions at the various levels, your emphasis should be on achieving competency in the **use** of oral questions.

### **Good Questioning Techniques**

The **general sequence** of oral questioning should be as follows. You should (1) ask a good question of the total class (e. g., "How does texture in... affect the...?"), (2) pause to give trainees time to formulate their responses, (3) direct the question to a specific individual (e.g., "Carl?"), and then (4) give the Carl time to reply fully and give attention and consideration to his response.

The reason that a question should be directed to a particular individual **after** the question has been asked is simple. If you first say "Carl" and then ask your question, every trainee in the class except Carl is off the hook. The other trainees do not need to try to formulate a response.

Ideally, Carl's response will stimulate other questions that you can, in turn, direct to other members of the group.

Questions should be **distributed** among group members so that each trainee has the opportunity to participate. One way to assure that a trainee who generally has difficulty in responding to questions can participate is to ask a question based on his/her past experience.

Questions should be asked in a **normal conversational tone** and loud enough for all group members to hear. You should reward correct responses (e.g., "Yes," "That's right," "Good," or "Correct") and avoid being critical of incorrect or incomplete answers.

Questions should be presented in a **logical sequence**, and you should **repeat** responses for special emphasis or clarity. You can bring other trainees into the discussion by asking them to **react** to another trainee's answer.

You should encourage trainees to go beyond the first answer, to **expand** and **clarify** an idea, and to corroborate it with facts and illustrations. Include "why" and "how" questions with "yes" and "no" questions. Strike a balance between *fact* and *thought* questions.

Trainee in-attentiveness can be discouraged if trainees know that you frequently ask questions. Some trainers suggest that inattentive trainees can often be brought into the discussion by directing a question to them. However, use caution here. To ask a question and then call on the daydreamer almost always ensures that He/She will not have heard the question. You will get his/her attention using this technique. However, by embarrassing the trainee, you may lose his/her future cooperation. Get this trainee's attention first; then ask the question.

In general, you should not repeat a question unless the question was directed at a large group and might not have been heard. Repeating questions can encourage inattention and poor listening habits. Another trainee can be asked to repeat the question, if necessary. Finally, avoid asking questions of the group in general. This encourages several trainees to speak at once. Rather, ask for volunteers and select from those trainees who volunteer.

## **Handle Responses**

Constructing a good question and asking it in the correct manner are the first steps in effective oral questioning. The next step is the proper handling of trainee responses.

The handling of trainee responses is the real test of a successful trainer. He/She categorized trainee responses into (1) correct answers, (2) partially correct answers, (3) incorrect answers, and (4) no answer at all. The following suggested practices for each category of responses are suggested.

**Correct answers:** You should reward correct answers with responses of recognition or praise (e. g., "Very good," "That's correct,"). Rewarding correct answers encourages subsequent participation and establishes the answer as being correct. Answers covering several key points can be broken down by asking other trainees to explain or expand on individual points in the response. Note, however, that if trainee responses are frequently lengthy, it may indicate that your questions are too broad.

**Partially correct responses:** When a trainee's answer is partially correct, you should give credit for the correct part and work to improve the incorrect part. You could say, "You are correct, Mary. Let's see if someone can enlarge upon your answer." You could then ask another trainee to expand upon the response. For example, "John, can you add anything to Mary's answer?"

**Incorrect answers:** When a totally incorrect answer to a question is given, you should give a non-technical response. For example, you could say, "A good try, but the main point of the question was overlooked." You could then refer the question to another trainee. Or, you could choose to ask the same trainee other questions that would logically lead the individual to the correct answer.

A third technique is to tell the trainee who gave the wrong answer that you will come back to him/her later for repetition or restatement. This is effective for the trainees who learn less rapidly; it makes them equally responsible to contribute a correct answer-but later in the period.

Occasionally a trainee will misunderstand a question and give an irrelevant answer. You can handle this by saying, "That would get us off the topic," or "The answer was good, but it didn't answer the question that was asked."

**No answer at all:** When one trainee is unable to respond at all, you should direct the question to another individual. If several trainees are unable to give a response, try rephrasing the question into simpler terms. If there is still no response, you may want to again teach that concept or ask your trainees to find the answer from reference materials.

If you frequently need to rephrase questions, it may indicate that you need to be more careful in the planning and construction of your questions. You should never use sarcasm in questioning. Never label a trainee's response as "stupid" or "What might be expected from someone who had not read the assignment." All sincerely offered answers should be accepted as contributions and used as an opportunity to develop further learning. Remember, if trainees knew all the answers, the subject would already be taught. Using wrong answers to promote learning is part of good teaching practices.

Questions from trainees are a sign of a healthy learning environment, an environment in which trainees are inquisitive and searching for answers. Your lesson planning should include anticipation of trainee questions.

You can handle trainee questions that are off the topic by offering to discuss the subject with the trainee on an individual basis after class. This avoids moving the lesson off on a tangent (which may have been the trainee's intent). At the same time, the trainee's question is accepted as a contribution. Referring a trainee's question to the other members of the class for an answer is a good teaching technique. For example, you could ask, "Bill, what is the answer to Mary's question?"

Whenever neither you, nor the class, can answer a relevant question, you should admit that you do not know the answer and promise to find it. At the same time, you may ask the trainee to look up the answer. You can then compare answers during a later class session.

Occasionally a trainee will attempt to stump you by asking difficult questions about the topic. You can respond with, "The class would be interested in knowing the answer to your question. Please look up the answer in the reference materials and report back to the class tomorrow." Use this approach sparingly however. Trainees may sometimes use incorrect grammar in their questions or answers. When this occurs, you can tactfully indicate the correct grammar usage by restating the trainee's statement in correct grammar by saying, "You mean..." Be careful not to discourage trainees by interrupting them before they are finished or by using a critical tone. The principle of positive trainer acceptance of all sincere trainee participation applies to trainee questions, as well as to trainee responses to trainer questions. The challenge to you is to encourage trainee participation and to use it for the development of further learning.

The following items check your comprehension of the material in the information sheet, *Employ Oral Questioning Techniques*.

## SELF-CHECK

### I. Matching:

To the left of each phrase in Column A, write the letter of the term in Column B that best matches the phrase.

#### Column A

- \_\_\_ 1. Trainee makes a judgment based on criteria
- \_\_\_ 2. Trainee changes information into a different symbolic form
- \_\_\_ 3. Trainee recalls information
- \_\_\_ 4. Trainees discover relationships
- \_\_\_ 5. Trainees solve a problem

#### Column B

- a. Knowledge
- b. Comprehension-translation
- c. Comprehension-interpretation
- d. Analysis
- e. Evaluation
- f. Application

### II. Multiple Choice:

Each of the incomplete statements listed below is followed by several words or phrases. From these, you are to choose the one that completes the statement most correctly. Place the letter of that answer (a, b, c, or d) in the blank at the left of the item.

\_\_\_ 1. The type of question that is often overused by trainers is-

- a. knowledge level
- b. application level
- c. evaluation level
- d. analysis level

\_\_\_ 2. The taxonomy should be used-

- a. to classify every question into a single category
- b. to select simple questions from lower categories and harder questions from higher categories
- c. to select questions from all categories at appropriate levels of complexity
- d. all of the above

\_\_\_ 3. Oral questions should be devised to take into consideration-

- a. trainees' intellectual processes
- b. emotional atmosphere of the class
- c. trainees' in-training and out-of-training experiences
- d. all of the above

\_\_\_ 4. Oral questions are an important aid in stimulating thinking because they will-

- a. arouse interest
- b. promote understanding
- c. develop new insights
- d. all of the above

\_\_\_ 5. Oral questions are used-

- a. in all situations
- b. to lead trainees into all kinds of thinking
- c. to get trainees just to recall facts
- d. to encourage bright trainees to answer difficult questions

\_\_\_ 6. The purpose of a question such as, "Why would a writer choose to publish under an assumed name?" is-

- a. to stimulate interest
- b. to stimulate logical or critical thinking
- c. all of the above
- d. none of the above

Compare your written responses to the self-check items with the model answers given below. Your responses should exactly duplicate the model responses.

## **MODEL ANSWERS**

### **I. Matching**

- 1. e
- 2. b
- 3. a
- 4. d
- 5. f

### **II. Multiple Choice:**

- 1. a
- 2. c
- 3. d
- 4. d
- 5. b

# USE CHALKBOARD AND FLIP CHART

## Learning Experience I

### OVERVIEW

After completing the required reading, demonstrate knowledge of the factors related to using the chalkboard and flip chart to present information.

You will be reading the information sheet, Present Information with the Chalkboard and Flip Chart.

You will be demonstrating knowledge of the factors--related to using the chalkboard and flip chart to present information by completing the Self-Check.

You will be evaluating your competency by comparing your completed Self-Check with the Model Answers.

You may wish to make one or more templates of cardboard, plastic, Masonite, plywood, and/or composition board for use in drawing frequently used illustrations.

### Activity

A chalkboard or flip chart seems like the simplest of training devices; trainers have been using each of these for generations. However, there is more to these common training aids than meets the eye. To learn when to use the chalkboard and flip chart, the basic techniques involved, and some special ways to improve your course by applying more creative techniques, read the following information sheet.

## PRESENT INFORMATION WITH THE CHALKBOARD AND FLIP CHART

The chalkboard and flip chart are two basic tools of training that, properly used, can contribute greatly to training effectiveness. Although anyone with a reasonable amount of study and practice can become an effective user of both devices, some trainers fail to optimize their use by assuming that no special skill or knowledge is needed. As Edgar Dale notes, "Chalkboard technique needs to be learned and practiced. Nobody is born with it." The same is true for flip charts, in that many of the techniques for using both devices are similar.

Chalkboards and flip charts are used to introduce a lesson, to present new materials, and to summarize or emphasize key points. Both devices are suitable for use with a large group, small groups, and individuals; and for use by both the trainer and participants. In a competency-based program, there may be less use of these devices for total-class lessons, but they are indispensable for mini-lessons and small-group training. Although the chalkboard and flip chart are generally best used in combination with other training techniques and devices appropriate to the particular lesson, they may also be used alone.

Instructional applications of the chalkboard and flip chart are nearly endless. They can be used in the classroom, laboratory and shop as well as on field trips and in nearly any other training setting.

These devices are suitable for a wide variety of specific uses, including the following.

- Present facts, principles, and concepts
- Illustrate concepts, ideas, and processes by means of diagrams, drawings, charts, graphs, sketches, maps, etc.
- Emphasize key factors by outlining, underlining, or otherwise highlighting important words
- Present assignments, announcements, definitions and problems to be solved
- List key words, rules, steps, procedures, or policies to be followed

The versatility of these two media is limited only by the imagination, creativity, and knowledge of the user. The remainder of this information sheet deals with the types of chalkboards and flip charts available, specific techniques for their effective use, and the advantages and disadvantages of each, respectively.

## The Chalkboard

The chalkboard is probably the oldest and most commonly used classroom training aid. Long known as the *blackboard* because it was made of black slate, today's improved chalkboards are an integral part of any well-designed modern classroom. There are several ways to mount chalkboards, the most common being the **stationary wall mounting**. This type of mounting is most suitable where adequate wall space is available in the front or on the side of the classroom.

Where wall space is limited, the sliding or folding chalkboard may be used. The **sliding chalkboard** is constructed like a double window, with two or three chalkboards on one wall. While one chalkboard is being used, the others slide up or to one side out of the way. A **folding chalkboard** usually consists of three or four boards (each about three feet square) that are hinged on one side and fastened to the wall. With this type of mounting, both sides of the chalkboard can be used, but the trainer must hold the board securely with one hand while writing with the other.

Another type of chalkboard is the **portable type**. The **portable** chalkboard is mounted on a frame. The **portable** chalkboard is supported by folding legs designed to prevent it from falling over. The **portable** chalkboard is commonly hung on two pivots that allow it to be flipped over so both sides can be used. The main advantage of this style of chalkboard is its portability, which allows it to be moved to any part of the classroom, shop, or laboratory as desired.

Chalkboards are available in a variety of colors including green, yellow, white, tan, black, and brown. The light-colored chalkboards are recommended because they provide better contrast and less eye strain because glare is reduced.

The only materials required in addition to the chalkboard are chalk and an eraser. White chalk is adequate for most situations, but diagrams and other illustrations can often be considerably enhanced by using a variety of colors. For example, in diagramming the systems of a truck engine, you might show the electrical system in blue, the fuel system in red, and so on. To facilitate the production of commonly used diagrams or symbols, you may also wish to make or purchase templates, patterns, or stencils.

"Chalkboards" are now also available that don't use chalk at all. These **liquid chalkboards** have coated panels (usually white) upon which you write with special quick-drying marking pens, available in a variety of colors. The surface can then be wiped clean using a cloth or an eraser-without water, chemicals, or cleaning solutions.

## Techniques

Effective use of the chalkboard requires the knowledge and practice of several important techniques, as follows:

**Keep the chalkboard clean:** Erasers, chalkboard, and chalk tray should be cleaned regularly. Erase all unrelated materials, and avoid tying up board space with announcements and other information that must be posted for several days. Keeping the board clean improves contrast and appearance, and eliminates needless distractions. In addition to the usual erasing, go over the entire board regularly with a damp cloth or sponge to make it look clean.

**Use chalk with good contrast:** The best color of chalk or marker to use will depend upon the color of the chalkboard used. However, colors that provide sharp contrast and aid easy viewing from all areas of the classroom are best. An assortment of colors should be available for use to increase contrast and provide variety when underlining key words and highlighting or differentiating parts of diagrams or sketches. Related to the contrast concern is the need to check the direction and type of classroom lighting so as to avoid glare from sunlight or artificial light.

**Make letters and drawings large enough:** All symbols should be made large enough to be easily seen by the entire class. This is important in order to avoid unnecessary eyestrain and to maintain the attention of trainees. (You may need to seat participants with vision impairments near the chalkboard so they can read it easily.) Letters should be between 2 and 3 inches high. It is much better to develop a standard printing technique than to write in script. If a large volume of material must be presented, it is usually more effective to use handouts.

**Avoid talking to the chalkboard:** Many trainers make the mistake of almost ignoring the group while writing on the chalkboard. You should turn frequently toward the group to maintain eye contact with the participants. In addition, you should discuss what you have written on the board to help participants who are taking notes, to provide both sight and hearing stimulation for learning.

**Avoid blocking the view of participants:** Try to avoid standing in front of materials on the chalkboard or otherwise obscuring it from view. Stand to one side as much as possible and use a pointer to direct attention to particular items. One useful technique is to write only a few words at a time and then stand aside so individuals can see what you have placed on the board.

**Plan in advance for effective arrangement of material:** Use chalkboard space efficiently. A little planning can help you avoid the disorganized and cluttered appearance that can result from giving unnecessary details or using poor sequencing. An outline form helps trainees take more organized notes and helps to emphasize the most important words and concepts.

**Prepare lengthy messages and complex drawings in advance:** To save time and to avoid losing the attention of the group, place detailed or complex material on the board in advance whenever possible. One very effective technique for dealing with a complex drawing is to construct a major portion of the drawing on the board in advance of the training period. Then, as you present the lesson to the group, you can fill in the details and sections requiring special attention.

Another technique that can be used to make elaborate drawings, and at the same time excite interest, is to gradually construct the drawing in advance of class over a period of several days. Written procedures that require considerable time to write neatly on the board should also be placed on the board in advance.

Use patterns, templates, and rulers to assist in making sharp and accurate drawings. If your area is one in which drawings are frequently used, you may find that a chalkboard drafting machine is extremely valuable. This is a



device that attaches to the chalkboard, which makes it possible for you to draw straight lines and angles and to measure accurately.

To ensure that your drawings and writing are accurate and neat, do not work with a tiny piece of chalk. To draw especially sharp lines, break a piece of chalk cleanly in two and then use the sharp edges of the chalk. Cover material you won't be using immediately with sheets of paper, window shades, or a cloth curtain so your participant's attention is not diverted from your immediate focus.

## **Specialized Applications**

Besides the basic practices, there are a number of specialized techniques for using chalkboards. There may be times when special benefit may be gained from making a complex drawing in front of the group. If so, you could use a lead pencil to draw an outline in advance that you can see close up, but that the group cannot. You can then trace over the pencil outline with chalk during the class presentation.

Images can be transferred to the chalkboard from a book or other source using the opaque projector. The projector can be focused to the size of illustration you wish by moving the projector closer to or farther away from the chalkboard and re-focusing.

Illustrations may also be transferred by the "pounce method." When several copies of the same image will be needed, develop or secure a stencil or chalkboard pattern with holes punched to outline the image desired. Tape the pattern to the chalkboard and pounce (tap lightly) over the holes with a chalky eraser. Then remove the pattern and connect the dots.

The revelation technique can be used, as appropriate, to uncover a series of steps or procedures one at a time and in the most logical sequence. Material prepared in advance is simply covered with paper, shades, or cloth as desired until the class is ready. Point-by-point revelation will help focus the class discussion on one point at a time.

Cartoons and stick figures may also be drawn on occasion to emphasize a point, add variety to the lesson, or focus attention on specific emotions and expressions. You may wish to draw them yourself or transfer images using the opaque projector or pounce method.

In addition to the use of prepared illustrations, the chalkboard can be used to increase the effectiveness of class discussions and individual conferences. As the discussion takes place, you can jot down an important term, make a quick sketch of a device, show relationships with a diagram, or clarify an idea with a few simple symbols. These informal techniques provide stimulus variety and helps focus attention on real visual images. Many people learn better that way.

## **Advantages of the Chalkboard**

The advantages of the chalkboard that cause it to be extensively used include the following:

- It is readily available in nearly every training room.
- It is relatively easy and convenient to use.
- It is suitable for a wide variety of uses by trainees and trainers;
  - The cost of maintenance and supplies is very low.
  - It is suitable for presenting and summarizing key points.

## Disadvantages of the Chalkboard

Although far outweighed by its many important advantages, the chalkboard has the following disadvantages:

- It cannot accommodate a large volume of material (many times handouts are more effective).
- It is not adaptable to keeping a permanent record
- Chalk dust is an irritant to some people

## The Flip Chart

The flip chart is another versatile and commonly used training aid. Also referred to as a *lecture pad*, the flip chart is suitable for use in the classroom, laboratory, and almost any other training setting because of its portability. The flip chart is normally mounted on some type of wooden or metal easel that holds the paper at a convenient working height. Many easels are adjustable in height and most fold into a compact size for carrying.

If desired, pads may also be mounted on a wall or hung like a picture. The sheets of paper may be bound in several ways: clamping with two wooden strips along the top edge, using a map head (clip) on a stand, binding with rings similar to those of a large loose-leaf notebook, or stitching and gluing like a book.

The consumable pads can be purchased in a variety of sizes and types. The most common type of flip chart material is bound newsprint purchased from paper supply houses. The pads are generally white or off-white in color. They are available in different sizes (18" x 24"; 28" x 36"; 36" x 45") and styles (plain, ruled, grid) and vary in the number of sheets per pad (50, 75). Some suppliers also offer the pads in different thickness: standard weight, heavy weight, and extra heavy weight.

Flip charts may also be made for a relatively small cost if you have the time and inclination. Some trainers have made excellent use of wallpaper sample books, poster board, or plain wrapping paper in making their own flip charts.

Besides the pad and easel, the only other material needed with the flip chart is some type of grease pencil or felt-tip marking pen. These are available in a wide assortment of colors that can be used effectively to add variety to drawings, emphasize key words, and so on. As with the chalkboard, the use of stencils, templates, and patterns can simplify the production of commonly used diagrams or symbols.

### Techniques

Effective use of the flip chart requires the knowledge and use of the following basic practices:

**Use marking pens and grease pencils with good contrast:** To maximize readability, felt-tip pens or grease pencils that offer enough contrast for easy reading should be used. The felt-tip pens should be of the wide "marking" type. An assortment of colors should be available for use in preparing sketches and underlining key phrases and words to add variety and interest to presentations. As with the chalkboard, the direction and type of classroom lighting should be checked to avoid glare, but this is not usually a problem because the surface of the paper is not glossy.

**Make letters and drawings large enough:** As with any other medium, to be effective, the symbols used must be large enough to be seen by the entire class. If considerable material is to be presented, several sheets should be used and thought given to possibly using handouts instead.

**Prepare lengthy messages and complex drawings in advance:** To conserve time, as with the chalkboard, detailed or complex drawings should be placed on the flip chart in advance. Templates, a compass, ruler, and other drawings aids should be used to produce accurate drawings. The nature of the flip chart makes it very easy to conceal material prepared in advance until needed. If drawings need to be made during training, a light pencil outline can be prepared in advance and traced in felt-tip in front of the group.

**Avoid blocking the view of training:** As with the chalkboard, it is easy to unintentionally block the view of some individuals. Care should be exercised to stand to one side of the chart and to use a pencil or pointer to focus attention on particular items.

**Avoid talking to the flip chart:** Words spoken while the trainers is facing toward the chart and away from the group are hard for trainees to hear and understand. You should practice turning frequently toward the group when writing on the chart to maintain eye contact and to present orally what has been written.

**Use the revelation technique:** The flip chart, because of its multi-sheet construction, lends itself handily to use of the step-by-step disclosure of sequential procedures or diagrams. Material can be prepared in advance and revealed at the most opportune moment in the discussion or presentation.

**Store frequently used charts and diagrams:** Rather than repeatedly preparing the same message or chart, you should store well-prepared material to be retrieved as needed.

## Specialized Applications

In addition to the common techniques already described, two specialized applications deserve mention. The opaque projector may be used with the flip chart in the same manner as with the chalkboard to transfer images from a book or other sources. In addition, cartoons and stick figures may be used on occasion to enhance presentations by focusing attention on specific moods and emotions and emphasizing a point.

## Advantages of the Flip Chart

The following advantages of the flip chart make it a favorite training device for many trainers:

- Because of its light weight and compact size, it is highly portable and can be taken to almost any location. It can be relocated within the classroom for use with small groups. It can be moved between training rooms (thus eliminating the need to recopy material), it can be taken on field trips, and so on. Its nature and design make it relatively easy and convenient to use. It is suitable for a wide variety of uses by trainees and trainers: drawings, charts, and notes.
- Sheets from the flip chart can be torn off and distributed for concurrent use by several individuals or small groups.
- Material can easily be revealed step by step, one sheet at a time when the information is prepared in advance.
- Sheets provide a semi-permanent record and can be easily stored for future reference.
- Initial purchase cost is relatively low in comparison to many instructional aids.

## Disadvantages of the Flip Chart

The following disadvantages of the flip chart should be considered when deciding whether to use one:

- It cannot accommodate a large volume of material (many times handouts are more effective when a sizable volume of information is to be presented).
- It is difficult and time-consuming to produce intricate and complex drawings (once prepared, however, they can be stored for future use).
- Because of its limited size, material may not be visible to large groups.

- The pads and sheets are consumable and new ones must be purchased.
- Material placed on the chart cannot be erased, changed, or easily corrected as is the case with the chalkboard.

## **SELF-CHECK**

### **I. Essay:**

Each of the following five items requires a short essay-type response. Please respond fully, but briefly, and make sure you respond to all parts of each item.

1. Explain why the chalkboard is such a widely used training aid.
2. Explain why many trainers make extensive use of the flip chart.
3. Describe several specific uses for which the chalkboard and flip chart are both suitable.
4. Name four types of chalkboards, and state an advantage of each type.
5. Describe five techniques for making effective use of the chalkboard. Of the flip chart

### **I. Case Situations:**

Each of the following seven items presents a situation in which you are to decide whether you would use (1) the chalkboard, (2) the flip chart, (3) both, or (4) neither. For each item, indicate your decision concerning which device you would use and give the reasons for your decision.

1. You want to present drawings that sequentially illustrate the major steps of a rather complex assembly process.
2. You want to transfer a complicated drawing from a reference manual so that all participants can view the same illustration at one time.
3. You are going to divide the class into several small discussion groups, and you want a member of each group to record the major points discussed in order to share them at a later time with the entire class.
4. You have a large volume of important information to share with the group, including several illustrations.
5. You want to develop and present to the entire class several illustrations to help clarify certain concepts and would like to be able to store them for future use.
6. You have several templates of some commonly used diagrams and wish to use them in presenting information to a group.
7. You are taking a group on a field trip and want to take along one of the aids to use in illustrating and summarizing some key points.

### **Feedback**

Compare your written responses to the self-check items with the model answers given. Your responses need not exactly duplicate the model responses; however, you should have covered the same major points.

# MODEL ANSWERS

## I. Essay:

1. The chalkboard is a widely used training aid for several reasons: (1) Its ready availability in nearly all classrooms, (2) its ease of use, (3) its low cost of maintenance and supplies, (4) its suitability for a wide variety of uses, and (5) its excellence for presenting and summarizing key points.

2. Many trainers make extensive use of the flip chart because of its portability and suitability to a wide array of situations. Its light weight and compact size make it easy to transport to almost any location, and its nature and design make it relatively easy and convenient to use for many purposes. Material placed on a flip chart can easily be revealed at the most opportune moment and can be easily stored for future reference.

3. The chalkboard and flip chart are both suitable for (1) presenting facts, principles, and concepts; (2) illustrating concepts, ideas, and processes by means of drawings, charts, and sketches; (3) emphasizing major points or words by underlining or otherwise highlighting important items; (4) making assignments and announcements; and (5) listing rules, steps, or procedures to be followed. They can be used in presenting new information, reviewing key points, summarizing a discussion, and in many other situations.

4. The four types of chalkboards and an advantage of each are as follows:

- **Stationary chalkboard** - It is easy to use and always available.
  - **Portable chalkboard** - It can be moved to any part of the room or from room to room.
  - **Folding chalkboard** - It can be used where space for stationary chalkboard is inadequate
  - **Sliding chalkboard** - It can be used where space for a stationary chalkboard is inadequate.
- It also lends itself to the use of the revelation technique.

5. Techniques for effective use of the **chalkboard** include the following:

- Keep the chalkboard clean to improve contrast and appearance.
- Use chalk that provides good contrast.
- Make letters and drawings of adequate size. Avoid loss of eye contact with trainees.
- Avoid blocking the view of trainees.
- Plan for the most effective arrangement of material
- Prepare lengthy messages and complex drawings in advance.
- Use specialized applications such as tracing a lead pencil outline, or transferring images with the opaque projector or the pounce method; and use the revelation technique, where appropriate.

6. Techniques for making effective use of the **flip chart** include the following:

- Use marking instruments that provide sharp contrast.
- Prepare complex drawings and material in advance.
  - Avoid loss of eye contact with trainees. Avoid blocking the view of participants.
- Use the revelation technique.
- Store frequently used charts and diagrams for future use.
- Use specialized applications, such as transferring images with the opaque projector, and use cartoons and stick figures as appropriate.

## II. Case Situations:

1. The best choice in this situation would be the flip chart. Because several drawings are needed and sequential illustration of a complex assembly process is desired, several sheets of a flip chart could be used (one per drawing), and the drawings could be revealed one at a time. Another advantage of the flip chart in this situation is that the drawings, which will probably require considerable time to produce, can be easily stored for future use.

2. In this situation, either aid could be used effectively. If a large-sized drawing was desired, the chalkboard would be more suitable. However, if the drawing could be used repeatedly and required considerable time to produce, the flip chart would be preferable so that the drawing could be stored.

3. The best training aid in this situation is clearly the flip chart because sheets can be torn off the pad and given to each group for note-taking.

Later, the major points discussed could be shared with the entire class by posting the sheets around the room.

4. In this situation, neither of the two aids is very satisfactory. Instead, consideration should be given to duplicating the information by copy machine or other means so that the material can be shared with all class members.

5. Here the clear preference between the two aids is the flip chart because material on the flip chart can be stored for future use.

6. Either technique is suitable in this situation. However, if the revelation technique is to be used in order to exhibit only one drawing at a time or to reveal them in sequence, the flip chart may be preferable.

7. The flip chart is the clear choice because of its portability.

**Level of Performance:** Your written responses to the self-check items should have covered the same **major** points as the model answers covered. If you missed some points or have questions about any additional points you made, review the material in the information sheet. Present information with the Chalkboard and Flip Chart, or check with the lead trainer if necessary.

You may wish to make one or more templates (patterns) of the illustrations that you would use frequently in presenting information in your occupational specialty. These templates could then be used in drawing illustrations on the chalkboard or flip chart. A variety of free and inexpensive construction materials, including cardboard, plastic, Masonite, plywood, and composition board, may be used.

# USE WORK SIMULATION

## Learning Experience I

### CONTENTS

After completing the required reading, demonstrate knowledge of the various types of simulation techniques and the characteristics of each.

You will be reading the information sheet, *Employ Simulation Techniques*.

You will be demonstrating knowledge of the types of simulation techniques and the characteristics of each by completing the Self-Check.

You will be evaluating your competency by comparing your completed Self-Check with the Model Answers.

Some form of simulation can be used to improve training in just about every occupational area-it's a matter of developing ideas and selecting the right technique. To find out how the various kinds of simulations can be applied to your training program and how to set them up, read the following information sheet.

### EMPLOY SIMULATION TECHNIQUES

Simulation techniques are gaining increased popularity in the classroom as a means of preparing trainees to function effectively in their chosen occupations. The advantages of simulation are many and the disadvantages few. Simulation is often more effective than other methods of training in gaining the interest of participants and in motivating them to become more involved with learning activities. Simulation techniques can accomplish the following:

- Provide a degree of realism and immediacy that is often lacking in the presentation or discussion of ideas
- Allow participants to experiment in a safe, simplified, and realistic environment with minimal fear of failure
- Permit participants to get feedback on their performance in a non-threatening situation
- Afford a realistic experience at a cost that is generally less than that involved in an actual experience
- Offer short-term experiences and feedback in what are often long-term processes in the real world
- Present a conflict situation that can involve the individual more actively in the learning process than can other training methods such as the illustrated talk
- Allow the participant some control over events in the situation
- Allow the participant to assume and experience other roles
- Control the situation and structure it so it may be handled
- Emphasize team learning and group interaction
- Combine cognitive, affective, and psychomotor learning
- Provide immediate feedback to participants
- In simulation experiences, theory and practice come together naturally. Instead of simply reading or hearing about the need to set priorities, business and office trainers can, in a simulated office situation, actually experience this need. Furthermore, they can practice responding to a variety of tasks as they would be expected to respond in the real work world.

- Decision making (such as that required in the setting of priorities) is encouraged through simulations, and decision making is at the core of meaningful learning. Critical thinking habits, attitudes, and knowledge of facts may be developed through simulation.

Because they are a step removed from reality, simulations are ideal for handling moral and ethical issues, human relations, and other sensitive areas. How better to learn to handle yourself at a job interview than to practice these skills through a role-playing situation. Simulation experiences are particularly important in competency-based training programs. Many occupational competencies require that participants train and practice in a setting as close to the actual job situation as possible. Simulations also provide a basis for evaluation of the trainee, with the trainee demonstrating proficiency in the target competency under the observation of a trainer.

Simulation techniques are effective in so many training-learning situations that every trainer should be competent in using the techniques. The effective use of simulation techniques requires that (1) before a simulation technique is used, the performance objective(s) be made clear to the students; i. e., they must know the purpose of the experience; (2) the trainees be oriented to the experience; and (3) a follow-up discussion be held at the close of the simulation experience to reinforce key concepts and evaluate whether the objectives have been attained.

Commercially developed or trainer-made simulation materials can be very effective. In addition, there are advantages to having trainees formulate and develop their own simulations. Generally, the trainer-designed experiences will be geared automatically to the right level of difficulty. If they aren't, Self-designed simulations let trainees focus on the new behaviors to be learned, rather than on the rules for participating in a simulation designed by someone else. Learning may also take place while the trainees are analyzing the situation in order to be able to develop a simulation. Trainee goals and interests remain the central focus of the simulation. Trainee-developed simulations are usually shorter and cost very little. However, a considerable amount of time may be required for their development.

## **Types of Simulation**

### **In-Basket**

The in-basket technique gets its name from the materials that are its key element. The technique is basically a decision-making exercise structured around a real-world situation. It focuses on a trainee's ability to set priorities and carry out tasks. Participants assume the role of decision makers and react to materials provided to them, such as letters, memoranda, and other papers that can be found in the incoming mail or in-basket.

An example of an in-basket exercise might be that of a basket placed on a "secretary's" desk containing (1) a letter to be typed for the supervisor within the hour; (2) a memo to be sent to an associate canceling a luncheon appointment; and (3) a request that the "secretary" make dinner reservations for the supervisor and a client. The "secretary's" assignment would be to decide the order in which the tasks should be completed and to perform the tasks required. At any time during the exercise, additional items (e.g., a phone call urgently requesting some important information) could be placed in the in-basket, requiring the "secretary" to consider adjusting priorities.

An elaborate form of in-basket activity is the simulated office setting. Here, a group of business and office workers assume all the roles of a complete office staff-accepting and distributing work, typing and duplicating materials, meeting deadlines, making decisions, and solving problems as in a busy office. The same technique could doubtless be applied to other service areas.



The in-basket technique provides a meaningful situation that requires the budgeting of time and setting of priorities for the performance of tasks. It also requires the demonstration of the skills involved in carrying out the tasks (e.g., computer keying). Feedback from the trainer and other participants allows the trainee to know exactly how well He/She is doing.

## **Equipment**

This type of simulation is useful when training employees who will work with equipment in the real world. Many times it is impossible to have the actual equipment in the training room because of space, cost, or danger. However, with some type of simulator, the participant can acquire the next best experience. The design of a simulator must allow the operation to be performed in the same way it would be in real life, but without extra features that might interfere with the basic skills to be learned. The simulator must be designed so that users have essential controls to manipulate just as they would in real life.

For example, a driving simulator allows users to react to realistic conditions that they might encounter in actual traffic. Feedback must be provided, so that the users can evaluate their responses and not continue to make the same mistakes. Use of skills not central to the experience are deliberately omitted. Thus, the driving simulator does not require the user to close the car door, stop at a gas station, park in the garage, etc.

Equipment simulators can range from simple, non-functional practice keyboards to something as complicated and expensive as the famous Link trainer used to train aircraft pilots. The U.S. space program has used simulators extensively, employing them to train astronauts to fly the command modules and creating a simulated surface of the moon on a Western desert. Unfortunately, the problem of expense somewhat limits the use of simulators.

Malfunction simulators have relatively complicated computerized consoles that allow participants to simulate performing a repair task. By pressing buttons, trainees can attempt to locate the malfunction in a piece of equipment. The computer then feeds back information describing the results of the individual's action.

Related to equipment simulators is the use of mannequins in health occupations. These "Chase dolls" simulate patients, and they can be used to train participants in many health-care procedures. Some of these mannequins are mechanically or electronically controlled to react to certain procedures in the same way as would a live patient. A "Choking Charlie," for example, disgorges a piece of simulated food from his windpipe when the Heimlich maneuver is properly performed. "Resuscitation Annie" is used in training participants to perform cardiopulmonary resuscitation (CPR).

In addition, computer-assisted instruction (CAI) is a rapidly growing technology with potential applicability in every classroom regardless of the subject. The technology, hardware, and software are available, and the costs are reasonable and becoming more so as the industry grows. Computer programs at present tend to be related to basic skills such as English and math. However, the skilled programmer can create programs for any subject. For example, a program can be easily created to cover the knowledge aspects of any area, using the principles guiding any good programmed instruction.

But beyond that, computers are being used to do wonderful things in the area of simulation. An auto repair problem can, for instance, be programmed into the computer. Individual trainees, then, can key solutions into the computer and receive immediate feedback concerning the appropriateness of their solutions without the danger of making errors on an actual automobile. Such simulation capacities are becoming highly sophisticated.

The atomic energy industry, for example, tests the safety of its power plants not in reality but through computer simulations.

The area of computer simulation, thus, is one in which you should definitely keep up to date for applicability to your own instruction.

## **Case Studies**

Case studies provide a description of a realistic problem situation. There are two basic types of case studies. One, which we shall call the case study, presents both the problem and how one individual (or group) solved that problem. The trainees' job, then, is to analyze how well that individual or group performed in solving the problem. In the process of analyzing another person's performance, trainees test their own knowledge as well.

A more complex test of the participant's knowledge can be accomplished using what we shall call the case situation. The case situation presents only the problem; it is open ended. It is then up to the group to analyze and solve the problem as if they were involved personally in the situation.

You can either (1) give the class or an individual a case study or situation or (2) guide the groups in developing it themselves. The case must appeal to trainees as being challenging, worthy of solution, and possible to solve. It must be something familiar to them, so that they have a background of experiences to use in working toward a solution. It must be stated interestingly enough to gain attention and be phrased in language suitable to their level of understanding. Of course, it must be related to the training objectives.

An example of a case situation follows:

John Jones is a salesman who works on a commission basis for a retail store. He has formed a friendship with another salesman, Joe Smith. Store policy has been that salespeople will take turns waiting on customers. John's friend, Joe, has started taking all the customers by greeting them as they walk into the store whether it is his turn or not. What would you do if you were John and needed the commission, but did not want to lose Joe's friendship?

Participants could work on this case individually then meet for a discussion of their solutions. This would not only be a good basis for an interesting discussion, but would help them to see other points of view and explore solutions other than their own.

## **Gaming**

Gaming is a type of simulation designed to bring about learning as a natural by-product of the problem-solving actions of a game. The aim is to mix cooperation and competition, as games do, within the learning situation. Games are stimulating and include a great deal of involvement. The consequences of the trainees' moves (decisions) are immediately apparent to all. Games involve actual behavior, rather than hypothetical verbal intentions or solutions.

Many games have been developed by commercial firms, such as "Consumer" and "Ghetto." However, games may be developed by the individual trainer or by the participants themselves. In fact, the process of developing a game may prove to be more of a learning experience than the actual playing of the game. In the process of development, they have to look at all aspects of the situation.

Games made by you or trainees may be more closely related to personal needs and the identified training objectives. For example, a consumer education trainer could develop (or have trainees develop) a game to teach the concept of nutrition. It could be either a board or card game with the various elements of nutrition involved, designed to train participants in how to choose foods wisely for optimum nutrition.

A good deal of information is now available in the literature about frame games. Frame games are so called because they provide the structure (the frame) for various games without providing the content. For example, a single frame game-intended to train-might be used to teach a particular concept to one group and another procedure to another group. The rules and format of each game are established; the content varies based on the objectives to be met. Frame games can be a flexible training tool in the hands of a capable and creative trainer.

Dormant and Thiagarajan, in their writing and through their workshops, offer training in the use of a variety of frame games, including Group Grope, Five Five, Scifi, and Great Debate. Group Grope is a game in which participants exchange and explore personal opinions about a common topic. In Five Five, teams compete and cooperate in order to generate a list and arrange the items in order of priority. Scifi is a game in which teams come up with solutions to common problems and identify the best solutions through peer evaluation. In Great Debate, participants take the roles of prosecutors and defendants and evaluate the pros and cons of a given object or activity.

The applications of such games to are unlimited. Group Grope, for example, could be used to help trainees deal with an emotional issue such as the use of computers. Each trainee would be given four blank cards and, on each one, would complete the statement, "Computers should..." Each participant then discards his/her two least favorite statements and gets three new cards with statements prepared by the trainer. The participant arranges these five total cards in order of priority and then goes to a table covered with cards and trades until He/She likes all five of his/her cards. Each participant then selects the one favorite card, goes to five other trainees, shows his/her favorite, and reads each of their favorites. Based on this sharing, participants are asked to team up with other trainees who have ideas compatible with theirs. From all their cards, members of each team select their five favorite ideas and devise a bumper sticker slogan summarizing these five ideas. The game involves decision making and group interaction skills.

Five could be used in a meeting to structure participants' selection of work activities to undertake. Scifi could be used to solve a customer relations problem. Great Debate could be used to evaluate the ethics of a particular work assignment. In all service areas, for all manner of purposes, frame games can be used to accomplish training objectives in a fresh and exciting way, with maximum trainee participation.

## **Role-Playing**

Role-playing is an "acting out" of a situation, problem, or incident that is of concern. For example, in a job training class, conflict situations concerning customer relations could be worked out through role-playing. Using this technique, participants assume a role in a serious effort to think and act as a designated character would be likely to do in a given situation. It is especially effective with small groups and should always be set within a framework of group participation for discussion and analysis. The audience can learn as much from observing and evaluating as those involved in the actual role-playing. In some cases, an entire small group of 10 or 12 participants can participate, taking various roles in, for example, a committee of labor/management negotiators.

Role-playing is an unrehearsed dramatization in which the players attempt to make a situation clear to themselves and to the audience by playing the roles of participants in the situation. To attain this purpose, the playing of the roles must be kept close to the reality of the situation, but still allow the players to react freely and spontaneously. The kind of role-playing most often used deals with understanding social situations and is thus called "sociodrama."

Role-playing is frequently used for teaching employability skills, but there are many additional possibilities where human relations skills must be taught and learned. Many occupational areas require skills in dealing with customers and clients. Marketing occupations employees need practice in the skills related to working with

customers or instructing subordinates in customer satisfaction. In management, role-playing might be used to develop employees' leadership skills.

Role-playing is not a magic technique by which all problems can be solved. It is an important technique that requires skill to use properly so as not to produce harmful effects instead of the desired outcomes. When used properly, role-playing can accomplish the following:

- Provide a kind of situation in which roles can be examined and experimented with in situations where a semblance of reality exists
- Give insight into the roles a person plays in real life and how effectively one plays those roles
- Teach employees to perform new roles and, thus, adjust more adequately to the groups of which they are a part
- Provide examples of behavior, which can be more effective than merely talking about the situation
- Help develop clearer communication, for it is sometimes easier to "act out" a situation than to put it into words
- Help employees to have a more sympathetic attitude toward others and to understand their points of view
- Help employees learn to express themselves more clearly
- Acquaint employees with problems and possible solutions
- Provide a means of extending emotional insights among group members and among groups
- Demonstrate in advance how they will probably react under certain real conditions
- Provide a basis for evaluating the mastery of the skills involved

Role-playing is a simple, but effective, technique for teaching the basic concepts of human relations—for gaining insight into why individuals respond the way they do in various situations. Role-playing can allow individuals to look at their own actions more objectively. As observers, they can perceive themselves in a role being played, feel how they would feel if treated that way. During the discussion period, they can hear how others feel about the behavior. Any criticism is directed toward a character in a role and not toward an individual.

Role-playing also teaches the important skill of putting yourself in the other person's shoes in order to understand how He/She will react in a particular situation and why. Thus, it is an important tool in helping participants learn to get along with other people.

Role-playing is an effective way to test alternative methods of working in a group or handling a situation. Role-playing can be fun for those who observe, as well as for those who participate, and can, therefore, often stimulate interest. It is a technique combining effective learning with an enjoyable experience.

Role-playing generally has three forms: (1) Role-reversal, (2) character role-playing, and (3) position role-playing.

In **role-reversal**, group members assume the roles of the other persons with whom they must interact; e.g., the participant becomes a customer or employee. This provides a way to identify with the other person's point of view.

In **character role-playing**, the participant becomes a specific person and acts as he thinks that character would act in that particular situation; e.g., the "actor" becomes Mr. Jones, Personnel Manager of Doaks Trucking Company.

Position **role-playing** is like character role-playing, except the facts about the person are not given. Thus, one is free to play the role as He/She interprets it; e.g., the actor plays the part of store manager, rather than a particular store manager.

The topics for role-playing situations are as broad as the area of human relations and problems. Problem situations are found in the home among family members; in the office among employer, employees and administrators; and on the job between employer's employees or between salespeople and customers.

Role-playing can be as simple as a parent trying to get a son or daughter up in the morning or as complex as a legislative committee dealing with a budget problem.

The following steps should be considered in involving a role-playing experience:

1. Prepare the participants for the experience by familiarizing them with a problem situation they can relate to.
2. Discuss the situation and help trainees see the problem involved.
3. Orient participants to the role-playing technique and define their roles thoroughly.
4. Call for volunteers and select the participants to act out the roles.
5. Give the participants a short preparation time (10 to 15 minutes) to think through the problem and the stand they will take. Give each a name card to aid in identification of the role.
6. Prepare the observers by having each select a character or two to follow. Later, they can see whether they agree with how the roles are interpreted and presented.
7. Proceed with the role-playing until the participants have had time to make their positions known. Then, stop while the interest is still high. The amount of time will vary with the situation, but usually 5 to 15 minutes are required.
8. Follow-up the role-playing experience with a carefully guided discussion. The follow-up activities you select will depend upon the objectives, but the following procedures are frequently used:
  - Ask participants how they felt when certain things occurred. Ask the observers how they would have felt in that situation.
  - Ask participants why they acted as they did in specific situations, and pose the same question to the observers.
  - Ask for suggestions for alternative behavior in the situation.
  - Summarize the learning experience.
9. Repeat the role-play with different individuals if participants are still interested.
10. Certain precautions should be observed in a role-playing activity as follows:
  - An individual should not portray a role involving his/her own personal problems. This can be painful and harmful. In other words, an individual who has an unpleasant telephone voice should not be asked to play the role of an employee with an unpleasant telephone voice during a role-playing activity performed before the entire group. This person needs help on an individual basis.
  - When analyzing a role-playing situation speak of the role, not the participants playing the role. In other words say "the secretary should not have...," rather than, "John should not have..."
  - Use volunteers only, if possible.
  - Do not select a situation that might embarrass persons in the group.
  - Discourage "hamming it up" in the portrayal of roles.
  - Integrate the role-playing session into the total lesson; it should not be just a time-filler.
  - Help the group leave the simulated experience with a feeling that there may be more than one answer to a problem.

- Do not rush the follow-up discussion, for this is an important period of learning.

## SELF-CHECK

The following items check your comprehension of the material in the information sheet, Employ Simulation Techniques. Each item describes how a particular trainer made use of a simulation technique. After reading each item, identify the type of simulation technique being used and **describe** its key characteristics in the space following the item.

1. Ms. Ryckman decided to help her group learn the concepts involved in money management through involvement in a simulation experience. Rather than plan and develop the experience herself, she enlisted the aid of the group. They became quite interested in the development of the simulation—a decision-making activity about money management. It was planned so that those involved in the simulation used cards providing different decision-making situations. Feedback was provided as they proceeded with the activity. Not only was the experience fun, but it proved to be quite effective in involving actively in the learning process.
2. Mr. Parsley found that several individuals in his class were experiencing difficulty in diagnosing problems in the diesel engines they were to repair. One of Mr. Parsley's friends had given him a truck engine that was still in his garage. He spent a few hours one rainy weekend incorporating the engine into a simulation activity that helped trainees diagnose problems and gave them instant feedback concerning whether their diagnosis was correct.
3. Mr. Fargen, the computer trainer, devised a simulation experience to aid his trainees in learning the concepts of office management. In a packet of materials, Mr. Fargen included records, bills, a tape of some phone calls, memos, etc., that might be part of a manager's experiences. Also involved were procedural instructions and a planning sheet for use as the trainees proceeded through the experience. After a few individuals worked through the experience, they met in a **small** group to discuss how each had performed the activities in the experience.
4. The trainees in Ms. Conner's group were experiencing difficulty dealing with situations involving customer relations. Ms. Conner decided to use a simulation technique to involve them and provide a common basis for discussion. She wrote several short stories about conflict situations involving sales personnel and customers. Ms. Conner gave one story to the trainees to solve individually; then they discussed their proposed solutions.
5. Mr. Page wanted his business and office trainees to have some real-world experiences involving supervisor-employee situations. However, he felt that they weren't ready for the actual experience yet as it would be too threatening for them. In preparation for the real-world experiences, Mr. Page decided to use a simulation experience. As a result of viewing a film, the participants were stimulated to plan some situations and then act them out to get the feel of the real situation. Those not involved as actors served as observers and evaluators of the activity.

Compare your written responses to the self-check items with the model answers given below. Your identification of the types of simulation techniques should exactly duplicate the model responses; your descriptions of the key characteristics of each type should closely match the model responses.

## MODEL ANSWERS

1. Gaming Simulation:

- Problem-solving activity
- Combines cooperation and competition
- Participant's moves (decisions) are immediately known, and consequences serve as feedback

- May be purchased commercially or developed by trainers or participants

## 2. Equipment Simulation:

- Simulated equipment must be realistic; i.e., include same parts for manipulation as the real thing and not be obsolete
- Extraneous details of the equipment or procedure may be omitted
- Usually less expensive than the real equipment
- Many times less dangerous than the real equipment
- Feedback must be provided either by the machine, by materials, or by the trainer

## 3. In-Basket Simulation:

- Includes active involvement in a mock situation
- Decision-making process involving the setting of priorities
- Tests participant's ability to perform tasks and carry through on procedures
- Includes memos, letter, phone calls, etc., that would normally come to a person in that specific position
- Feedback is provided as trainee carries through on the simulation and in follow-up discussion

## 4. Case Study Simulation:

- Problem-solving technique in which a story or conflict situation is presented
- Participants (usually individually) seek solutions to the problem situation
- Feedback is provided through a follow-up discussion
- Provides a common basis for discussion

## 5. Role-Playing Simulation:

- Volunteers act out situations to learn how they may respond in the real world
- Those not portraying roles serve as observers of the roles being played
- Criticism must be of role, not the player, so as not to cause embarrassment to individuals
- Feedback is provided through follow-up discussion involving both actors and observers

**Level of Performance:** Your identification of the techniques should have exactly duplicated the model responses; your description of key characteristics should have covered the same **major** points as the model responses. If you missed some points or have questions about any additional points you made, review the material in the information sheet, *Employ Simulation Techniques*, or check with your lead trainer if necessary.

# USE BRAINSTORMING

## Learning Experience I

### OVERVIEW

After completing the required reading, demonstrate knowledge of the purposes of and steps to follow in using brainstorming.

You will be reading the information sheet, *Stimulate Learning through Brainstorming*

You will be demonstrating knowledge of the purposes of and steps to follow in using brainstorming by completing the Self-Check.

You will be evaluating your competency by comparing your completed Self-Check with the Model Answers.

For information defining brainstorming and the steps to use in planning and implementing these techniques read the following information sheet.

### STIMULATE LEARNING THROUGH BRAINSTORMING

The techniques of brainstorming, buzz group, and question box are designed to stimulate or "get things going" with a group. As a trainer, you may use these techniques to actively involve trainees in the process of selecting topics or planning activities to be introduced. This involvement can encourage participants to develop their creative thinking abilities and to be active participants in the workplace.

These same techniques may also be considered occupational skills in some training and development areas. In such fields as marketing, advertising, and graphic design, for example, brainstorming is often used to generate new ideas and to reach group consensus concerning business plans. Trainees, therefore, should be given the opportunity to use these techniques. Encourage your trainees to use these techniques, both to stimulate their work and to gain experience in functioning effectively as group participants.

### Brainstorming

Brainstorming is a technique used to stimulate creativity and promote the involvement in the learning situation.

Often, it is used as a preplanning technique. Participants first generate alternative suggestions through brainstorming, which you can then consider in planning learning activities.

It is most effective when the group is not too large (8-10 members is desirable) so there is ample opportunity for everyone to respond and participate in the short time (e.g., 10-15 minutes) usually allocated for the activity.

The brainstorming session should be guided by a **leader**. This person may be you, the trainer, or a trainee selected by the group members or by you. In addition, a **recorder** must be chosen to fulfill the important responsibility of keeping a written record of the suggested alternatives. This person may be selected by you or by the group members.



When choosing a topic or concern for a brainstorming session, you should identify one that is specific. This will help to keep participants' ideas or suggestions from covering too broad an area. In addition, you should be sure that the topic can be easily understood and that they will have the ability and interest to deal with it effectively. Whatever topic you choose, it should be carefully described to trainees before the brainstorming session begins.

For an early brainstorming session, the purpose of the session should not be to solve complex problems but to produce a wealth of fresh ideas from which further planning may draw. The following are examples of topics that might be appropriate:

- What shall we do for this year's marketing exhibit?
- How can we interest more employees in participating in the sales organization?
- How can we cut down on waste in the office? Conserve energy?
- How can we reduce travel costs?

Evaluation and criticism are **not** allowed during brainstorming. Assessment of the ideas is done at a later time. All ideas related to the topic are welcomed. A variety of alternative suggestions will help to generate more effective plans of action. Because a quantity of varied suggestions is desired, participants are requested to give spontaneous responses without weighing their value at that time. This technique is also known as a "popcorn" session because participants are encouraged to keep the ideas popping steadily during the allocated time.

Participants need to be oriented to the brainstorming process if it is to be productive. You should explain the purpose of brainstorming and how a typical session operates. Perhaps you could put trainees through a "dry run" so they could get the feel of how brainstorming works. This could also alert the group to possible pitfalls. For example, participants could be made aware that making disparaging remarks or groaning audibly when a suggestion is made can undermine the brainstorming process—can discourage others from contributing their ideas.

The leader has the responsibility for monitoring the actual brainstorming session. The leader should stay in the background as much as possible but should interject ideas to stimulate thinking and keep the responses coming, if necessary. He/She must take care that negative or evaluative phrases are kept at a minimum. If you are not the leader, you should make certain that the individual chosen as leader encourages a spontaneous flow of suggestions and discourages the making of value judgments about any idea put forth.

Adequate orientation of the group to the brainstorming process can help to ensure that the session does not get out of hand. It will help to ensure that (1) participants take their task seriously, (2) they do not confuse spontaneity with nonsense, and (3) a few individuals do not dominate the session. If, during the actual session, all the ideas seem to be coming from a few individuals, an expectant or encouraging glance at the quieter individuals may be enough to get them talking.

The recorder has an important and active role in keeping a written record of all suggestions made during the brainstorming session. This record is usually written on the chalkboard or flip chart so that all can see, and so that memory won't have to be relied on when the evaluation process begins at a later time.

After closing the brainstorming session at the prearranged time or when the ideas are exhausted, you should arrange for the recorder to report on the suggestions made. The reporting can be done orally at the close of the session. Or a report can be submitted in writing at a later time. Or the written report can be delivered orally, using a combination of both methods.

Although the brainstorming technique has limitations, these can be avoided by carefully planning and conducting each session. The productivity of the session (in terms of involvement of participants and quality of

alternatives generated) depends on how well participants have been oriented to the process and to the topic to be considered. Even though the generating of alternative ideas is an objective of a brainstorming session, the stimulating effects it has on participants is often equal to, or even more important than, the ideas produced.

Brainstorming can be used in any training situation. For example:

- A business trainer could use brainstorming to involve trainees in suggesting alternatives for solving the noise problem in the simulated office situation.
- A trainer might use brainstorming to involve trainees in suggesting ways to ensure that their equipment and materials are not left in the way.

## **Buzz Group**

One technique that is often used to stimulate learning is the buzz group. This device was originally developed by Phillips and is often termed the "Phillips 66" method since it involves six minutes and a six-member group, as defined by Phillips.

To increase involvement in discussion and to obtain the benefit of everyone's ideas, the group may be divided into small groups of six (or some other small number). First, you should explain the specific question to be addressed by the groups and make certain that everyone understands what is to be discussed. If everyone does not understand before discussion begins, many problems can develop.

For example, if participants are uncertain about whether they are to discuss what dress code regulations should be instituted at work, or **whether** their employer should have the **right** to require certain dress, the groups may spend valuable time spinning their wheels. Most of their time may be spent deciding what to discuss, rather than dealing with the issue itself.

The topic that is chosen must be limited so that all aspects can be adequately explored. It must also be simple enough that trainees do not become discouraged in trying to discuss it in so short a time.

You should select, or ask each group to select, a **leader** and a **recorder**. Taking the responsibility for designating competent leaders and recorders can be a valuable learning experience for trainees, but there may be occasions when you should step in. For example, you may have trainees in your class who are never chosen as leaders. You may wish to intervene in order to give these individuals the opportunity to develop leadership potential or their ability to talk to a group.

Participants should be oriented beforehand to the responsibilities of the leader and recorder. They must understand that it is the job of the leader to make sure that the group sticks to the topic and that all group members participate. In addition, they need to understand the importance of the recorder's job of keeping accurate written records of key items discussed and decisions reached and of reporting this information to the total group.

The discussion or "buzzing" should proceed for the short period of time previously designated. The leader should encourage less aggressive individuals to join in the discussion, so that a few highly verbal individuals do not control the discussion and prevent good group interaction.

While the discussion proceeds, you should monitor the progress being made in each buzz group by circulating among the groups. If necessary, you should encourage the leaders, with a word or a nod, to seek the participation of all members of the groups or to bring the discussion back on target. After you close the session, you should ask each recorder to summarize the discussion of his/her small group for the entire group.

The buzz group is a good method to use to encourage individual participation and creative thinking by each individual and to promote interaction among the group. The technique is appropriate for any training situation. For example:

Mr. Andrews used the buzz group technique in a class to stimulate the interest and active involvement in exploring and discussing differing family life-styles. He found more of the group willing to indicate their questions and concerns in small groups than in a large-group situation.

- Jean Green used the buzz group technique effectively during a safety meeting to allow employees to discuss what their department's objectives should be.
- Ms. Piper used the buzz group technique in her group to let individuals explore and discuss any problems they were encountering in their on-the-job work experiences.
- Mr. Whitecap organized a buzz group session in his group to allow members to discuss the anxieties they had about beginning a new job. This helped individuals realize that they shared similar problems, and it helped Mr. Whitecap deal with these problems in future training groups.

# GIVE AN ILLUSTRATED TALK

## Learning Experience I

### CONTENTS

After completing the required reading, demonstrate knowledge of how to present an illustrated talk.

You will be reading the information sheet, *Present an Illustrated Talk*.

You will be demonstrating knowledge of how to present an illustrated talk by completing the Self-Check,

You will be evaluating your competency by comparing your completed Self-Check with the Model Answers.

For large- and small-group training, the illustrated talk can be an excellent way to present information. But "to lecture at" participants can be very boring. To learn how to plan and deliver an effective illustrated talk and what different types of illustrations can help clarify your ideas, read the following information sheet.

### **PRESENT AN ILLUSTRATED TALK**

Some people feel that there is no such thing as a good lecture, or "formal" talk, because they think the method itself is outdated and inadequate-particularly in view of the wide variety of training delivery methods and materials available to today's trainers. However, lectures do have a place and some advantages that should not be overlooked when you plan your lessons.

One of the reasons the lecture or talk continues to be a predominant strategy is that it is, for the trainer, a very efficient way of conveying to trainees exactly the content desired, in exactly the form desired. Information is not, after all, always available through other training resources.

For example, recent technological advances may occur, which aren't yet described in the regular training materials. A particular explanation in the text may be too sophisticated for employees. Or, the focus of content in a film may not meet your particular training needs. In such situations, you can tailor a presentation to fit the unique needs of your training objectives and your participants.

Furthermore, a lecture/talk need not be grim and unexciting. By including verbal and visual illustrations in the presentation and by delivering the presentation with skill and enthusiasm, you can make the lecture/talk an absorbing, stimulating, and effective training technique.

In presenting information using an illustrated talk, you can serve as a central dispenser of knowledge, while trainees take notes. Or you can encourage participant interaction during the presentation. The method you select depends on several factors, one of which is your own style of training-what you feel most comfortable doing.

Second, it depends on the type of information being taught. If, for example, trainees are learning material that is entirely new to them, it might be best to present the information first and then to solicit feedback, rather than to encourage individuals to interact throughout the presentation.

Third, the size of the group will affect the style of your presentation. Soliciting feedback from a large group during a presentation can be a time-consuming, clumsy process. In large groups, using some method of obtaining individual feedback might be more efficient.

Finally, the types of trainees are a factor; you need to consider which type of presentation would communicate best with your particular group. If participants are good listeners and note-takers, a trainer-centered illustrated talk can be a very efficient and effective way to present information. For those who cannot sit passively and listen, even to the best illustrated talk, encouraging interaction and participation during the presentation can be an excellent way to get them actively involved in learning.

## **Planning the Presentation**

Many trainers find it helpful to refer to notes when they present information to a group orally. Even a brief outline can help keep you on track. However, you may need more detailed reminders, depending on the type and quantity of information you are presenting.

After you have had some practice in giving a presentation, you will be better able to judge how extensive your preparation should be. In any event, your preparation should be thorough enough to ensure that you do not need to concentrate on your notes during the presentation.

You need to observe trainees as you speak-to concentrate on them. Their reactions will tell you whether you are being understood. You should keep your eyes open for cues to help you decide whether you need to speak louder, repeat an explanation, ask a question, draw a diagram, etc.

The following points are provided to help you plan your presentation:

- **Purpose-**

Write a statement of purpose (an objective) covering the skill that you want participants to develop through the presentation (e.g., *Demonstrate knowledge of safety procedures, etc.*).

- **Key points-**

Make a note of the key points you want to cover. Place them in a logical sequence so that your trainees will have sufficient background to understand each new point as you present it. Plan your talk around participants, not around your material. Let their needs and interests determine what you cover, and don't present more material than they can understand.

A 20-minute lecture on the assimilation of computer data, which is appropriate for a group of office coordinators, may not be appropriate for a group of beginning drivers.

- **Introduction-**

The purpose of your presentation should be made clear in an introduction. Tell them what they will learn and how it will affect them. An introduction should orient trainees to the lesson and prepare them to receive the information you are going to present.

- **Summary-**

Presenting a good summary is an important part of your lesson. If you are giving a long or difficult lesson, you may need to recap points as you progress from one point to the next. At the conclusion of the lesson, be sure to reinforce key points. You may do this by repeating key points briefly in the order in which they were presented. Or you may choose to use some other method of summarizing, depending upon the type of lesson you are presenting or the needs of your trainees.

- **Evaluation-**

To evaluate your presentation, you need to determine whether, as a result of your illustrated talk, trainees were able to meet the training objective. You should plan ahead of time how you will determine this. After a trainer-centered illustrated talk has been given, you might ask for questions or comments. You may give a test or an

assignment to see how well you have communicated. Because a talk involving trainee participation is more spontaneous, your evaluation can also be more spontaneous. Depending on their reaction, you might use a discussion, a role-playing situation, questions, or other types of activities to evaluate understanding.

### **Delivering the Presentation**

In presenting any illustrated talk, you should be familiar enough with your material that you can watch the participants while you talk. A trainer who stands in front of the group staring at notes or concentrating on an explanation may not notice that participants are yawning or talking. In particular, your presentation should be planned carefully so that you can vary it spontaneously, depending on reactions from your audience.

If you find yourself losing the attention of your audience, for instance, try changing the pace by telling a related story or showing a visual illustration. If they don't seem to understand your point, be ready to simplify your explanation, shorten the talk, or even substitute another activity in its place. An observant trainer will know how long a presentation should be and will tailor it to the trainees' level of understanding.

Frequently, trainers feel that a talk must be delivered in very formal language. Nothing could be further from the truth. Talks should be conversational in language and tone. Always be yourself-natural and relaxed-whether you are giving a formal presentation or an informal one. Know your audience, and talk to them on their own level, not above it.

Remember, your manner of delivery-the way you inflect your voice, emphasize words, gesture-conveys meaning, just as your words do.

If you appear bored, chances are that your audience will also be bored. If you are excited and interested, your audience will probably be motivated to listen to you.

Trainers sometimes stand in one position at the front of the group when making a presentation. Actually, you should vary your movements, just as you should vary your pace and tone, when giving a presentation. If you stand motionless before a group, you may soon lose their attention. They may turn their attention to other objects, such as windows, walls, or reading material.

Do you have a pet phrase or gesture? Many people do, without realizing it. Any characteristic, even an inconspicuous one, can become monotonous and distracting if it is overdone. Such habits as stroking the hair, adjusting a watch, or playing with a pencil or a piece of chalk can be annoying. Constantly punctuating your speech with such words and expressions as *like, you know, right, ah, and urn* can also become very annoying or distracting to others.

These types of mannerisms are usually unconscious. Thus, you will notice them only if you really think about what you are doing or if you have the opportunity to see yourself on a videotape.

Humor can be a definite boon to any presentation if it is spontaneous and related to an important point. A teacher is not a comedian, however, and should not attempt to win the group over with canned jokes. Trainees can usually see through this type of humor, and often it falls flat. In particular, don't tell the same story regularly simply because it's one of your favorites.

The important points you should remember when presenting information orally are as follows:

- Speak clearly and loudly enough so that every person can hear you.
- Don't speak too rapidly or too slowly-avoid unnecessary pauses.

- Don't read from notes. Look at your audience as you talk. Watch their expressions and movements to determine whether you are being listened to and understood.
- Be enthusiastic. Don't use a monotonous tone.
- Use gestures for emphasis, but avoid annoying or distracting mannerisms.
- Be conversational and natural.

## **Using Illustrations**

Both verbal and visual illustrations can help clarify concepts. Listening and viewing are more effective when used together, so you will want to plan to use both verbal and visual illustrations in giving a presentation.

Visual aids need not be elaborate. Often a simple diagram drawn on the chalkboard or a chart projected onto a wall will complement a lesson equally as well as a feature film.

Whatever type of visual aid you use, the important thing is to plan for its use ahead of time. Know when you are going to use it, and have it on hand so that you can go smoothly from an explanation to a visual aid without breaking the flow of the presentation. Remember that every individual should be able to see the visual aid and that you should be looking at your audience-not at the visual aid-during the presentation. Don't stand in front of a diagram and talk to it, while your trainees struggle to see through you.

Verbal illustrations-analogies, frames of reference, anecdotes, examples-help to convey meaning just as pictures, graphs, diagrams, or filmstrips do. In giving a presentation, you need to know how to use verbal illustrations to hold the interest of your participants and to make your meaning clear to them.

## **Analogies**

An analogy is a comparison of one thing to another that emphasizes the similarities between them. In general, the known is compared to the unknown so that individuals can apply their previous knowledge to a new situation.

For example, the flow of electrical current through a wire can be compared to the flow of water through a pipe. A molecule in motion is analogous to a bouncing ping-pong ball. The rotation of the earth on its axis is analogous to a spinning top.

Don't use an analogy unless the similarities of the elements being compared outweigh the differences. Recognize the limits of an analogy-don't give your trainees the impression that electrons flow through a wire because of gravitational attraction as is the case with water flowing through a vertical pipe.

And make sure that the "known" part of your analogy is, in fact, known to your trainees. Trainers sometimes make the error of comparing the unknown to something that is common knowledge to them, but not to trainees. Then you end up presenting two unknowns and confusing the group.

## **Frames of Reference**

A frame of reference is the knowledge or set of attitudes that a person brings to a new experience. In learning a new concept, for example, trainees must use their previous knowledge as a reference and build upon it to master new knowledge. By presenting information in terms of a learner's previous experiences, you can help individuals grasp new ideas quickly. The introduction to a talk is one logical place to use frames of reference.

Another use of frames of reference is in teaching individuals to analyze situations from different points of view. For instance, a trainer who is giving a talk on sales techniques might want to have participant role-play a situation in which a dissatisfied customer returns a piece of merchandise to the salesperson who sold it. Allowing trainees to see the situation from different frames of reference-the customer's, the salesperson's, the store manager's-can help clarify the point that the customer is always right.

Or, a talk on the importance of safety glasses might include a case study about an employee who lost her eyesight by neglecting to follow the correct safety practice. Participants could be encouraged to consider the consequences of the accident from different frames of reference-the employee's, the trainer's, the company administrator's, the contractors'-to emphasize the importance of following the safety practice.

Frequently, frames of reference are established through group interaction in an informal learning experience. For instance, discussions are a very natural way to encourage trainees to analyze a topic from different viewpoints. A role-playing situation encourages them to act out their feelings, to analyze their own and others' behavior, and to consider alternative types of behavior. A case study allows groups and individuals to analyze a problem and to consider their own solutions in relation to other solutions.

Analogies can also help to establish frames of reference. If you draw an analogy between the flow of electricity and the flow of water-the resistance of the pipe to the water is analogous to the resistance of the wire to the electrical current, and water pressure is analogous to electromotive potential-you have established a frame of reference based on the individuals' knowledge of how water flows through a pipe.

## **Anecdotes**

An anecdote is an amusing or interesting story that is designed to illustrate a point the speaker is trying to make. It may be true or fictional, long or short. Following is a typical anecdote:

A young boy asked a wrinkled, tottering old man, "How do you do it? What's your secret for living such a long time?"

The old-timer replied, "Well, I drink a pint of whiskey a week; I smoke a pack of cigarettes every day; and I never go to bed before midnight. I know how to enjoy myself, and I live each day for itself. That's what keeps me young."

After the young boy pondered the old-timer's words a bit, he couldn't resist asking a second question, "How old are you anyway?"

"Thirty-five," answered the old-timer proudly.

This might be an appropriate illustration for a point about nutrition or rest. Often such an anecdote remains in our memory longer than the talk it was part of. If it makes a point, that point may remain clear in the groups' mind long after they have forgotten the rest of the lesson.

Anecdotes should be a natural part of a talk and suited to your particular group. Don't force an anecdote into a talk where it really doesn't belong just because it's one of your favorites.

## **Examples**

An example is a representative instance of a general principle, process, or idea. A dictionary is an example of a reference book. A toaster is an example of a household appliance. Using examples is a natural and effective way to illustrate a point. When you find yourself saying *for example* or *for instance*, you are using an example to



illustrate a point. Make sure, however, that your example is actually representative of the point you are trying to make. And be sure that you choose examples from your group's frame of reference. In other words, be sure to use examples that they can readily grasp and apply to the concept you want to teach.

In summary, when you are using any type of illustration to clarify a point, you should keep a few criteria in mind:

- Does it relate directly to your point? Don't use an illustration merely because it's an attractive visual aid or idea. Make sure it contributes to the message you are trying to get across.
- Is it accurate? Use factual, typical illustrations as much as possible. Avoid generalizing from a fictional or isolated case.
- Is it clear? Try to use enough detail so that your listeners can follow you, but don't bore or confuse them with irrelevant information.
- Is it the best way to present information? Whether you are using verbal or visual illustrations, ask yourself whether there is a better way to get your point across.
- Is it appropriate to the audience? Illustrations should be carefully planned for the ability level of learners.

The following items check your comprehension of the material in the information sheet, Present an Illustrated Talk. Each of the 11 items requires a short essay-type response. Please explain fully, but briefly, and make sure you respond to all parts of each item.

## **SELF-CHECK**

1. What are the advantages and disadvantages of presenting information using a trainer-centered talk?
2. What are the advantages and disadvantages of encouraging interaction during the presentation of an illustrated talk?
3. If you were planning a presentation, what factors would you consider in determining whether to encourage trainee participation?
4. What specific things would you do to prepare a presentation?
5. As a rule of thumb, it is suggested that a talk be broken down according to the following time limits: 20 percent for the introduction, 60 percent for the key points, and 20 percent for the summary. Why should an introduction and a summary be included in a talk?
6. Trainee feedback is the basis for evaluating whether a talk has been understood. What are some different ways of obtaining participant feedback?
7. During a presentation, the trainer needs to be alert to trainees' reactions. In some talks, participants may contribute comments and questions throughout so that the trainer is constantly aware of how well He/She is communicating. But, in other presentations, there is no direct verbal feedback from participants until the presentation is finished. How can a trainer determine whether trainees are understanding this latter type of presentation?
8. Mr. Jones is a trainer who likes to sit at his desk while he lectures. He prides himself on being well prepared. He uses detailed notes and follows them very carefully. He has a tendency to dramatize his lectures and to shout occasionally to attract an individuals' attention. Participants like him, though, because he doesn't seem to mind their doing their individual work while he lectures. What do you think of Mr. Jones' style of delivery?

9. Define the following types of verbal illustrations: analogy, frame of reference, anecdote, and example.

10. Why are illustrations needed in an oral presentation?

11. How can you decide whether use of a particular illustration is a good way to clarify a point?

Compare your written responses to the self-check items with the model answers given below. Your responses need not exactly duplicate the model responses; however, you should have covered the same major points.

## MODEL ANSWERS

1. A trainer-centered presentation can be advantageous if the trainer is presenting information to individuals who are entirely new to them. This is particularly true if participants would have little to contribute during the presentation. Such presentations are also advantageous in large-group training situations in which the number of trainees would prevent trainer-trainee interaction throughout the talk. If trainees listen well and take good notes, such a talk can be an efficient way to present information. However, it may be difficult to determine whether participants are actually listening to and understanding the talk merely on the basis of their nonverbal reactions.

2. Two important advantages of encouraging interaction during a presentation are (1) the trainer receives continual feedback during the presentation and can use this feedback to vary the course of the presentation, if needed; and (2) trainees who have difficulty listening passively or taking notes can get actively involved in the presentation. The advantages are partially offset by one important disadvantage: the larger the group, the more time-consuming it becomes to encourage interaction throughout the presentation. The trainer must act as a moderator to keep the talk on target. Otherwise, it can disintegrate into a bull session.

3. Following are some things you should consider when you plan a presentation:

- What type of trainees do I have? Are they good listeners? Can I tell whether they are understanding me just by watching their facial expressions, or should I solicit feedback during the presentation?
- Does the subject of the presentation lend itself to trainee interaction? Do my trainees have enough background knowledge of the subject to contribute to the talk?
- Is group feedback or individual feedback more appropriate to the size of the group?
- Would I personally be comfortable with a great deal of interaction during this particular presentation?

4. Most trainers like to make notes to guide them through a presentation. The purpose of the talk should also be written down. Then, the key points should be listed in their correct order. If you need to visually illustrate any of these points, you should prepare visual aids ahead of time and have them on hand during the talk.

Verbal illustrations should be thought out carefully in advance to be sure each one clearly illustrates the point you want to make. Make sure that you can cover each point in a reasonable amount of time for your particular group of trainees. Organize your talk around an introduction, key points, and a summary. Then, plan and prepare the evaluation device to be used. For example, if you decide to lead a discussion, write down some key questions ahead of time.

5. The purpose of an introduction is to get participants ready to listen. It should inform them of what they will learn and why it is important. The summary should briefly recap the main points of the lesson to reinforce and clarify them. The summary is also a bridge from the lesson to the evaluation activity.

6. Evaluation of trainees' knowledge may be obtained by giving a test or work assignment, soliciting questions and reactions from trainees, asking them questions, leading a discussion, using a role-playing or case-study activity, and so on.

7. During a presentation in which trainees interaction is not encouraged, the trainer should keep an eye on the group at all times and watch for cues, such as yawning, whispering, puzzled expressions, or daydreaming, to alert him/her to trainees' reactions.

8. Mr. Jones' lectures should be conversational in tone, not dramatic exercises. His habit of stationing himself at his desk is also a poor one. Moving around the room would help hold participants' attention. Apparently Mr. Jones pays more attention to his notes than he should, since he doesn't notice that trainees are doing their work while he lectures. His habit of shouting to attract attention and his tendency to dramatize can become distracting and monotonous, just as any mannerism can if it is used routinely.

9. An analogy is a comparison of a known object, idea, or process, to an unknown object, idea, or process, in which essential characteristics of both things being compared are basically similar in nature. A frame of reference is the background knowledge that a person brings to a new experience (i.e., it is "where a person is coming from"). An anecdote is a story that is used to illustrate a point. An example is a representative instance of a general principle, process, or idea.

10. The purpose of both verbal and visual illustrations is to clarify meaning. A well-chosen illustration can convert a vague generality into a clear concept. Illustrations are like handles that allow participants to grasp larger ideas, to remember them, and to use them.

11. The criteria for deciding whether a particular illustration is a good one are as follows:

- Does it relate directly to the point?
- Is it accurate?
- Is it clear?
- Is it the best way to present information?
- Is it appropriate to the audience?

Level of Performance: Your written responses to the self-check items should have covered the same major points as the model answers. If you missed some points or have questions about any additional points you made, review the material in the information sheet, Present an Illustrated Talk, or check with your lead trainer if necessary.

# LEADERSHIP

## Readings On Leadership Skills

EXCERPTS FROM: SUCCESSFUL MANAGER'S HANDBOOK, PERSONAL DECISION, INC., DALLAS, BRIAN L. DAVIS, LOWELL W. HELLERVIK, CAROL J. SKUBE, SUSAN H. GEBELEIN, AND JAMES L. SHEARD, 1992.

### Leadership Skills

Leadership: The ability to make things happen by encouraging and channeling the contributions of others, taking a stand on and addressing important issues, and acting as a catalyst for change and continuous improvement. Successful trainers are successful leaders.

In the past, leadership was simpler. Yesterday's managers could demand performance. Today's managers are faced with a more educated and democratically oriented workforce. Problems and opportunities are complex and challenging.

As a result, today's manager must encourage and apply the contributions of all of the company's human resources, both individually and in groups. You need the creativity and resourcefulness of everyone to find solutions and the commitment of all employees to implement these solutions effectively.

This section contains developmental activities in the following seven major areas of leadership skills identified as essential to trainer and managerial success:

**Provide Direction:** Fosters the development of a common vision; provides clear direction and priorities; clarifies roles and responsibilities.

**Lead Courageously:** Steps forward to address difficult issues; puts self on the line to deal with important problems; stands firm when necessary.

**Influence Others:** Asserts own ideas and persuades others; gains support and commitment from others; mobilizes people to take action.

**Foster Teamwork:** Builds effective teams committed to organizational goals; fosters collaboration among team members and among teams; uses teams to address relevant issues.

**Motivate Others:** Encourages and empowers others to achieve; establishes challenging performance standards; creates enthusiasm, a feeling of investment, and a desire to excel.

**Coach and Develop Others:** Accurately assesses strengths and development needs of employees; gives timely, specific feedback and helpful coaching; provides challenging assignments and opportunities for development.

**Champion Change:** Challenges the status quo and champions new initiatives; acts as a catalyst of change and stimulates others to change; paves the way for needed changes; manages implementation effectively.

### PROVIDE DIRECTION

The hallmark of an effective leader (trainer or manager) is clear focus and direction. Successful leaders operate with a vision of where they are going, and they use this vision to inspire their people and their organization.

Some leaders generate this vision and direction from within themselves and then develop support for it within their organization. Others work with their teams to create a vision together. In either case, it is this clear vision and focused direction that allow leaders to align and direct the energy and resources of the organization to achieve desired goals.

Successful leaders align their vision with that of the larger organization of which they are a part. They then work with their team to identify the mission and goals of the team, out of which come the roles and responsibilities of each individual. This process helps ensure that each individual's objectives and decisions support the larger vision and eliminates many activities that are counterproductive.

This section provides suggestions on how to create and communicate vision and clarify each person's responsibilities in creating that vision. It addresses the issues of:

- Fostering the Development of a Common Vision
- Providing Direction and Defining Priorities
- Clarifying Roles and Responsibilities
- Linking the Team's Mission to That of the Organization
- Making the Team's Mission and Strategies Clear to Others

Tips

- Use your employees or management team to help create and update vision, mission, and strategies on a yearly basis.
- Communicate your vision, mission, and strategies - and the rationale behind them - throughout the organization.
- Remember that effective leaders focus on the "right stuff."
- Make sure your direction is customer focused.
- Clearly communicate departmental objectives and solicit input from your employees on what they can do to help achieve them.
- Be willing to set priorities.
- Meet with employees to show them how their contributions support the goals of the organization.
- Periodically ask your employees for their vision of where they see their jobs and the department going. Use their ideas to update the vision statement when appropriate.
- Make sure that new employees receive a copy of the department's vision, mission statements and that their role in meeting these is clear.
- Meet with people who are skilled in translating broad strategies into day-to-day activities to get their ideas on how to provide good direction to your people.
- Consider having off-site meetings with your entire department to discuss performance in the past and goals for the future.

## **LEAD COURAGEOUSLY**

Today's environment demands that leaders (trainers and managers) make decisions that involve risk, and take their stand in the face of ambiguity or adversity. Individuals who lead courageously confront problems directly and take action based on what they believe is right. They win the respect and commitment of others by standing up for what they believe; making tough decisions despite ambiguity; by supporting others who make difficult decisions; and by following issues through to completion in spite of adversity.

The suggestions in this section cover the following topics:

- Clarifying what Is Important
- Taking a Stand for Values
- Demonstrate leadership Courage
- Drive Hard on the Right Issues
- Taking a Stand to Resolve Important Issues
- Confront Problems Promptly
- Be Decisive
- Challenge Others to Make Tough Choices

Tips

- Identify the most deeply held convictions. Use those convictions to guide your leadership.
- Give people the feedback they need even when it may be difficult.
- Openly acknowledge that your stand may be unpopular, and then explain why it is important for others to consider your point of view.
- Stand behind your people and back their decisions.
- Say "no" clearly and explain why.
- Attack problems, not people
- Identify the people whose courage you most admire. Talk with them and learn how they act on their convictions.
- Talk with decision makers about how they arrived at their decisions and how they dealt with people's reactions.
- Use simple, clear language when communicating your position.

- When you see a need or problem that you wish someone would address, ask yourself if you could be doing something about it.
- In meetings, verbalize your concerns so they can be openly discussed.
- Determine if one of your peers or trainees has a chronic performance problem that no one has really addressed. Then deal with it.
- Identify the upper-level manager you find most intimidating or critical and make a conscious effort to be candid with this person during your next encounter.
- Honestly determine if you tend to avoid passing negative information upward.
- Report on both your successes and your failures with equal candor,
- Decide if you are spending more energy protecting positions than holding individuals accountable.
- Step forward with a position of principle even when there is ambiguity regarding the facts.
- Take calculated risk, Ask yourself, "What is the worst thing that could happen?" and then decide if proceeding is worth the risk.
- After speaking up for what you believe is important, be gracious whether your ideas are accepted or rejected.
- Remember that being a leader is not a popularity contest. You may not always be liked, but you should be respected.
- Show the courage to let people learn from their mistakes,
- Believe that you have the power to make a difference, and accept the responsibility of trying.
- Read books or watch video tapes that exemplify true courage in others. They can inspire you to strengthen your courage in dealing with training-related issues.

## **INFLUENCE OTHERS**

Leadership has taken on new meaning and greater challenges in the last decade. Influencing is a critical skill in today's environment, in which you must work with so many people to do your job. No longer can you order things to be done; no longer are problems so simple that everyone agrees on one solution,

Looking into the next century, it appears that leaders in training, business and industry will continue to encounter situations that will demand increasingly sophisticated skills to get others to endorse their initiatives. Influencing skills, then, will continue to be a critical asset.

This section provides suggestions for developing the following skill areas:

- Increase Your Leadership Impact
- Improve Leadership through Feedback
- Become More Assertive
- Give Compelling Reasons for Ideas
- Win Support from Others
- Negotiate Persuasively
- Get Others to Take Action
- Command Attention and Respect in Groups
- Influence the Decisions of Upper Management

### **Tips**

- Use a variety of techniques to influence others. View influencing as a problem to be solved. Use brainstorming and buzz groups as many ways as possible to influence a particular person.
- Seek assignments that give you an opportunity to lead a group or influence others, such as training.
- Be one of the first people to offer ideas in meetings (if you usually let others take the lead?).
- Encourage trainees to come to you with ideas, and then support the implementation of ideas you see as viable.
- Don't back down quickly when challenged. Instead, restate your position clearly to ensure that others understand your perspective.
- Prepare for your next meeting by looking over the agenda and thinking about the contributions you can make.
- Informally talk with your peers and your manager about their goals and concerns. Use this information when you need to link your ideas to their needs.
- Observe people who are highly influential and try out the techniques that seem to work for them.
- Ask your peers for feedback on how persuasive you are. Ask them for suggestions on what you could do to be more influential.
- Attend a leadership skill development program and apply the principles with your own trainees.
- Practice being more forceful in situations such as community meetings where the costs, risks and implications are not as great as they are at work
- Continuously ask yourself how your objective and goals fit into the broader objective of the organization, and communicate this to others.
- Create a clear vision of the kind of leader you want to be and then live it.
- Be willing to take the ideas of people to the next higher level and support them enthusiastically. Give credit where credit is due.
- View yourself as a leader.

- Identify the behaviors that you believe are critical to success in your organization, and then lead by example.
- Adopt a "can-do" attitude and approach challenges from a problem-solving perspective. Look for alternative solutions, rather than focusing on why things can't be done.
- Initiate new ideas, objectives, goals and projects.

## **FOSTER TEAMWORK**

The synergy that comes from putting employees together to form teams to solve problems, make decisions, and take action is power that organizations can harness for greater success. In these increasingly complex, changing times for business and industry, teams can supply more creative solutions and more powerful support for the organization. With an effective team, "the whole is greater than the sum of the parts."

Whether the team is a permanent work group, a temporary task force, or a training group creating such teams and leading them to success requires skill and finesse on the part of the team leader.

This three-part section provides suggestions to help you foster successful teamwork.

### Part 1: Creating an Environment Conducive to Teamwork

- Recognize Training's Impact on Teamwork is as important as Management's Impact
- Build a Team Environment

### Part 2: Building Your Team Leader Skills

- Build a Team
- Value the Contributions of MI Team Members
- Encourage Interaction among Group Members
- Increase Interdependence within Your Team
- Discourage "We versus They" Attitudes
- Involve Others in Shaping Plans and Decisions
- Acknowledge and Celebrate Team Accomplishments
- Evaluate Your Effectiveness as a Team Member

### Part 3: Developing Team Problem-Solving and Decision-Making Skills

- Decide when to Use a Team Approach
- Improve Your Team Decision-Making Process
- Seek Appropriate Input before Making Decisions
- Improve Your Group Facilitation Skills

### Tips

- Schedule a focus group meeting to build team spirit and commitment to goals.
- Assess your decision-making style, paying attention to the extent to which you solicit others' ideas. Look for opportunities to use a more participative approach.
- Make a list of the key strengths and limitations of each person on your team. Find ways to utilize the strengths.
- Find ways to involve quiet team members without embarrassing them. Try using open-ended questions and reflective listening to draw out quieter members of your team.
- Use active-listening skills to acknowledge, summarize, and reinforce the contributions of your team members.
- Avoid premature judgment of others' ideas and suggestions,
- Strive for win-win solutions.
- Reward team accomplishment.
- Value and show appreciation to your administrative and support staff.
- Celebrate as a team.
- Pull your people together as a group to solve problems.
- Foster an environment of trust by ensuring that all criticism is constructive and is focused on individuals' behaviors, not personalities,
- Use your team to develop the group's vision, mission, objective and goals.
- Share success with team members.
- Show your trust by sharing information beyond what is necessary.
- Have fun while working.

## **MOTIVATE OTHERS**

Imagine that one of your most capable employees has reached a "productivity plateau." For the past month, He/She seemed bored with their job and have done only "what's needed to get by." Nor have they shown any interest in a promotion you discussed with him/her six months ago. You're not sure what the problem is, but it's obvious that their motivation level has dropped.

There may be many reasons why this employee's motivation has waned. Among the areas to consider: He/She is unclear about what is expected; He/She has not been receiving regular feedback about job performance; has "outgrown" the current job, but is uncertain about his/her skills for the promotion; lacks a sense of achievement; and his/her responsibilities have evolved into a mismatch with job skills.

This section provides guidelines for handling motivation-related issues like the one described above. It examines the importance of:

- Use Basic Principles of Motivation
- Learn Motivation Approaches from Peers
- Establish High Standards of Performance
- Convey the Attitude That Everyone's Work Is Important
- Convey Trust in People's Competence to Do Their Jobs
- Inspire People to Excel
- Create an Enjoyable Work Environment
- Enrich Jobs to Increase Motivation
- Reward People for Good Performance
- Individualize Your Approach to Motivation
- Create a High-Performance Environment
- Convey Enthusiasm about Departmental Objectives

### **Tips**

- Encourage employees to set ambitious goals. Reward effort and achievement.
- Serve as an example to others by performing at a high level of excellence.
- Give credit where credit is due,
- Communicate the achievements of your unit and your employees to higher-level management in a visible and positive way, showing pride in, and support.
- Use your group as sounding boards in areas where they have expertise.
- Know what aspects of the job excite employees, and then provide them with opportunities to pursue these activities.
- When introducing topics, talk about your expectations for excellence.
- Identify the behaviors that you feel are critical to success in your organization, and then lead by example.
- Learn what rewards your employee's value that you can provide.
- Notice the good work people are doing and talk about it to them and to others outside your area.
- Establish a group identity and work at building pride in group membership - "esprit de corps."
- Recognize that some people may be happier outside your organization, and encourage their departure for their good and the good of the people remaining.
- Give recognition to people who strive for excellence and improve quality.
- "Go to bat" for subordinates.
- When seeking to change the behavior of participants, specify both the current and the desired behavior, and identify the positive and negative consequences of each,
- Find ways to enrich the jobs of employees by increasing their authority or span of control,
- Don't ask your people to do things that you are not willing to do yourself.

## **COACH AND DEVELOP OTHERS**

Employee development is an ongoing process, not a single event. From the time employees join your organization until they leave, they are continuously challenged to perform. It is your responsibility as a trainer, to both employees and the organization, to develop employees and enable them to perform at their highest possible level.

In an environment of constant change, employees are required to develop new skills and hone their old ones. The continuum of development ranges from helping poor performers improve to leveraging the strengths of long-term employees to capitalizing on "stars" by keeping them challenged and "stretching" their current skills, Supporting the development efforts of employees contributes to their individual productivity and the productivity of the team as a whole.



The guidelines presented in this section take you through a number of phases, from new-hire employee orientation through grooming experienced employees for advancement.

#### Part 1: Develop Employees

- Improve Employee Orientation Program
- Train New Employees
- Identify Others' Strengths and Developmental Needs
- Provide Ongoing Coaching
- Provide Development Challenges
- Tap the Talent of Administrative Personnel
- Create Developmental Assignments
- Prepare Employees to Represent Supervisors at Meetings
- Use Training Programs to Develop Employees
- Prepare Effective Personal Development Plans

#### Part 2: Give Effective Feedback

- Provide Regular and Timely Feedback
- Give Others Positive Feedback
- Temper Premature Criticism
- Provide Constructive Criticism

#### Part 3: Address Employee Performance Problems

- Analyze Performance Problems
- Coach Employees with Performance Problems

#### Part 4: Groom Employees for Advancement

- Show an Interest in Employees' Careers
- Provide Information on Career Advancement within the Organization
- Increase Employees' Exposure to the Total Organization
- Develop Replacement Workers/Administrators/Managers

#### Tips

- Give positive recognition immediately.
- Meet individually with employees to discuss their career goals and identify the skills they need to achieve these goals.
- Identify the weakest performers and decide whether you think these individuals have the ability to perform adequately. If so, develop a program to bring them up to speed.
- Ask yourself, "What do people have to do to get positive feedback from me?" Evaluate your expectations.
- Don't hesitate to confront poor performance as soon as you notice it. Give feedback and begin constructive action to help.
- Maintain a development file (Succession Plan) on each employee. Keep track of successes, failures, training, development needs, and agreed how to help. Use this file during the performance appraisal process.
- Focus your feedback on the behavior of individuals. Be more descriptive and less evaluative in your feedback.
- Remember that people master tasks in small steps, Help employees become competent by building from small to larger responsibilities.
- Help employees build their skills by having each work on improving one development need and enhancing one of their strengths at a time. Be specific about the steps he or she can take to meet goals.
- Be alert to articles and development tips that could be of help to others; pass them on to appropriate individuals.
- Create your own development handbook of ideas especially suited to your company and function in the organization.
- Meet with employees individually to identify what you can do to help them be more effective in their jobs.
- Identify the one or two employees most likely to replace you and begin grooming them for your responsibilities.
- Rotate people through key positions to develop their general leadership capabilities.
- Let your employees stand in for you.
- Encourage a "continuous improvement" mind-set where mistakes and accompanying efforts to improve are rewarded.

#### **CHAMPION CHANGE**

Companies stagnate if they don't change to embrace new technologies, meet market demands, respond to employee needs, or create new business opportunities. Effective leaders seek out, initiate, support, and manage needed change; they are "change champions." They see opportunities for improvement and motivate others to seek and implement productive changes.

Your willingness and ability to initiate and champion change, to use people in planning and implementing change, and to coordinate change efforts in the organization will determine your effectiveness as a leader in today's competitive business environment.

This section provides suggestions to help you initiate, implement, and champion change in your organization.

#### Part 1: Understand the Change Process

- Assess Your Own Reactions to Change
- Understand Resistance to Change
- Address Resistance to Change
- Understand Fence Walking
- Address Fence Walking
- Understand Change Agency
- Address Change Agency

#### Part 2: Managing Change

- Know the Steps of Effective Change Management
- Plan the Change
- Gain the Commitment of Key Individuals
- Determine Readiness for Change
- Set-Up Needed Systems and Structures
- Involve Others in the Change Process
- Communicate the Change
- Follow-Up on the Change
- Implement Organizational Change

#### Part 3: Champion Change

- Champion New Initiatives
- View Change from a Big-Picture Perspective
- Motivate People to Welcome Change
- Stimulate Others to Make Changes and Improvements

#### TIPS

- Always involve the people who will be affected by change in the planning, training and implementation process.
- When planning change, ensure that objectives, responsibilities, and time frames are defined and clearly communicated.
- During times of broad organizational change, be available and share whatever information you can.
- Tell people what you think the change will mean for them, and then listen to their reactions.
- Listen to and ask for a lot of advice in change situations.
- Use a multi-functional task group to identify opportunities for change.
- Expect resistance to change; develop strategies to deal with it.
- Prepare to expect changes; continuous improvement means change.
- Develop transition plans.
- Allow people to talk about their feelings, especially when they feel they are losing something due to change.
- Treat resistance to change as a problem to solve, not as a character flaw.
- Seek projects that require initiating and planning change within your organization.
- Meet with someone who has implemented change successfully. Discuss the steps he or she took throughout the change process. Review your own plans for change with this person, and ask for feedback.
- Communicate your vision of the change to others so they **can** more easily understand and buy into the change.
- Identify the change champions in your organization and work with them to support and initiate change.
- Find early successes and recognize them.
- Hold feedback meetings to allow others to express their feelings about how the change is going.
- Through books or courses, learn about a change model that can help you understand how people change and, therefore, better manage change through your training activities.
- Educate others about change and how people typically react to it.



