



TRAINING BASICS

For small businesses

Written and produced by **Duets Learning**
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Framework

The Story Framework

The **Story** is the framework that will help you think clearly about what you are attempting to accomplish with your workshop.

The Story Framework

A Ultimately, I want _____.

B So as a result of my class, I want _____ to be able to _____.

C In order for them to be able to do that, they will be exposed to the following during my class _____.

D I will use instructional techniques, such as _____.

E I will know that they've learned those steps in my class, when I can SEE or HEAR them _____, _____ [during, immediately after, soon after] the class.

Four D Process



Define



Stage Description

During the *define* stage, you conduct a *Needs Assessment* to identify the **current, desired, and performance gaps** between them.

Stage Benefit

Needs assessments help ensure that learning experiences are meaningful and valuable to both the learners and the organization.

Stage Purpose

Instructional designers use the information about the gap (or need) to identify content and activities for the course.

Getting it done: Do it Yourself

Defining your learners' needs and the learning experience's goals is called a *needs analysis* or *assessment*. A needs assessment helps answer the question, "What performance needs to be changed and why?"

Do it Yourself Process

1. **Identify the desired state.** A change usually drives the need for a new desired state. For example, the people on the sales team need to improve their sales presentation skills because of increased competition.
2. **Identify the characteristics of the desired state** that you want to adopt. "Better" does not describe an actual performance. Instead, let's say you may want the team to create presentations using a pre-defined format that may increase the strength of your product's value proposition. The *desired state* is for all members of the team to know how to use the template and accompanying process.
3. **Identify** what performance is happening now (**current state**) that does not match the behaviors of the desired state. Be as specific as possible. In the sales team example, perhaps their presentations are too long or they don't address the prospect's needs soon enough.
4. **Document** your findings to use as you build your learning solution. If possible, quantify your findings. For example, it may be possible to say that 20% of sales are lost during the pitch meeting. Ideally that percentage will *decrease* as a result of the learning experience. Comparing quantitative data before and after training is the best way to measure impact.

Try not to jump to solutions during this process. Stay focused on *defining* the gap instead of *closing* it. Most of all, **do not assume that training will close the gap between the current and desired performance**. Frankly, training is never the solution. It only supports the solution after you address other issues impacting performance could be a lack of:

- Management support and feedback
- Adequate process definition and execution
- Resources
- Time to practice the desired performance

Getting it done: Outsource

You can hire instructional designers to help you conduct a needs assessment. Instructional designers can:

- Develop a holistic plan for conducting a needs assessment that will target the data points that will uncover what you're looking for.
- Identify the people who need to be involved in the assessment.
- Determine the best way to gather the data.
- Suggest how assessment questions should be written and how they should be framed for participants.
- Determine the best way to compile the data and report the essential findings to key audiences.

Keep in mind that a needs assessment is an intensive exercise. Consequently, knowledge about the company or the business can be both a benefit and a hindrance. For example, if you hire someone who doesn't know your company inside and out, you will have to fill in many gaps for them. But, having a person inside the organization conduct the analysis may be a hindrance due to preconceived notions regarding the solutions before the data is gathered.

Do it Yourself Resources

Online:

- [Training Needs Assessment](#)
- [Needs Assessments in Instructional Design](#)
- [Survey Tools](#)

Outsourcing Considerations

Information to provide candidates:

- Amount of time allocated for conducting the assessment
- What role will internal resources play in conducting the assessment
- An estimate of the number of people to be involved in the data-gathering process
- The performance being addressed
- Whether you will also want the designer to design learning solutions as well after the data is gathered

Questions to ask candidates:

- Does the designer have experience planning, conducting, and reporting the results of a needs assessment?
- How much time should be allocated to an assessment (if you are unsure)?

Design



Stage Description

During the design stage, the designer creates a blueprint for partially closing the performance gap between the current and desired state. The plan includes the needed content, the methods for presenting that content, and descriptions of what the learner will do with that content during the learning experience (i.e. group exercises).

Stage Benefit

A solid design helps ensure the performance needs identified in the needs assessment will be addressed. Without a design, there is a tendency to include purely informational content that will not contribute to the desired performance in a meaningful way.

Stage Purpose

The design stage is where you create the blueprint for the learning experience. The stage begins with performance objectives identified during the assessment and ends with a design document that describes the learning experience. The course development process depends on a design that can be effectively executed.

Getting it done: Do it Yourself

The instructional design process may start with a simple outline but can grow from there, depending on the needs uncovered during the assessment. The complexity of the subject matter and performance goals play a big role in how elaborate a design will be.

Do it Yourself Process

1. List what you want learners to be able to do after the course based on the findings from the assessment. Be realistic and consider the amount of time allocated to the experience.
2. Turn the list into performance goals.
3. Create a course outline based on the goals, allowing enough time to support the learners in reaching their performance goals.
4. Create a content outline by locating and shaping the content needed to address each section of the outline and to support the performance goals.
5. Create exercises and discussion points that support an understanding of the content and support the learners in reaching their performance goals.

Getting it done: Outsource

You can hire instructional designers to design your learning experience. An instructional designer will:

- Create learning objectives based on a needs assessment or other methods
- Determine which content will help the learner close the performance gap
- Develop strategies for the best presentation methods and the order in which to present content to learners
- Design opportunities for learners to interact with the content and practice the performance that will be expected of them outside of the classroom

Instructional design is a repeatable process used with any subject matter. An instructional designer who understands this process can design for any content, whether or not they have prior experience with it. While it's undeniable that some background in the subject matter may speed up the design process, it should not be seen as a requirement.

Sidebar: Instructor-led Training (ITL) vs. eLearning vs. Both

A course design must consider the method by which the course will ultimately be delivered to the learners. We tend to group them into three categories: Instructor-led, eLearning, or Blended (which means the experience has both classroom and online elements). Instructional designers can apply the same process to any delivery method, but individual designers may have a preference or more experience in one modality.

As far as which modality is best, the debate rages on. Each has its strengths and weaknesses.

Do it Yourself Resources

Online:

- [Instructional Design \(Wikipedia\)](#)
- [Gagne Nine Events of Instruction](#)
- [Instructional Design Templates](#)

Outsourcing Considerations

Information to provide candidates:

- The anticipated delivery mode (classroom vs. online)
- Amount of time allocated for designing the course
- Anticipated initial delivery date
- What role will internal resources play in creating the design
- An estimate of the number of learners to be involved in the learning experience
- The performance and subject matter being addressed
- Whether you will also want the designer to develop the learning solution as well after the experience is designed

Questions to ask candidates:

- How much experience does the candidate have in designing courses?
- Does the candidate have examples of their work?
- What industries and audiences has the candidate designed for?

Develop



Stage Description

During the development stage, the course materials are built using the design document, an outline, or some other blueprint. Course materials may include PowerPoint presentations, a leader's guide, a participant guide or worksheets, and job aids.

Stage Benefit

Whether the course's materials need to be developed depends on the course design. Materials can serve a purpose and may make effective teaching and learning tools. Only create what's necessary for learners to meet their objectives while participating in an engaging experience.

Stage Purpose

The development stage is where the course comes to life. You are essentially building an environment where the learning experience will occur. You start this stage with a design blueprint and end it with a fully developed course.

Getting it done: Do it Yourself

Developing course materials can be the most tedious or interesting part of the process, depending on how much you enjoy working with words and details. Some skip the design part and jump immediately to development, but by doing so, you risk having to redo work once your direction gains better focus.

Do it Yourself Process

1. Identify what materials need to be developed based on the course design. Create a table that lists each document's type, purpose, and content summary.
2. If others need to review the content, set up a review schedule and strategy so that the reviewers know what's expected of them and when.
3. Begin with the primary source of content. This is typically the presentation with notes added that will serve as a script. If there is no presentation, create the outline that the instructor will use to guide learners through the content.
4. Create participant materials to support content delivery. These include participant guides, worksheets, and job aids.

Getting it done: Outsource

You can hire Instructional Designers to develop your courses, including all materials, regardless of who designed the course. They can:

- Help identify which materials should be developed and how and when they should be provided to learners
 - Create a plan for developing and reviewing all materials
 - Develop the materials using Microsoft Office tools and other specialized formatting tools
- Experienced Instructional Designers can format documents for purpose, function, and visual effect (i.e. make them usable and pretty)

If you are outsourcing eLearning development, do not assume that all Instructional Designers can or want to develop eLearning using the tools you need. Also, there are people who are primarily Instructional Developers and do not design instruction.

Sidebar: Developing Online, Multimedia Resources and eLearning

This document focuses on developing instructor-led, classroom-based courses, but online courses also need to be developed. Needless to say, building online learning requires an additional level of expertise. Online learning is not just a class put online. It is its own breed of instruction that requires that developers know several other disciplines, including rapid eLearning development tools, graphic design, interface design, and usability.

Creating online demonstration videos does require knowledge of specific tools, but demonstrations are simpler to develop because they typically require little to no learner interaction.

Do it Yourself Resources

Online:

- [Strategies for Developing Instructional Materials](#)

Outsourcing Considerations

Information to provide candidates:

- The anticipated delivery mode (classroom vs. online)
- Amount of time allocated for developing the course
- Anticipated initial delivery date
- What role will internal resources play in creating the design
- An estimate of the number of learners to be involved in the learning experience
- The performance and subject matter being addressed

Questions to ask candidates:

- How much experience does the candidate have developing courses?
- Does the candidate have examples of their work? (**Note: DO NOT HIRE** developers without seeing samples. They may say that all their past work is proprietary, but they could easily redact the client's information and show you an excerpt.)

Deliver



Stage Description

During the delivery stage, the learner is engaged in the learning experience. This could be a class, an apprenticeship, an online demonstration, a workbook, and/or an online module.

Stage Benefit

This process is about delivery: Getting the learners engaged in an experience that will facilitate needed change in performance.

Stage Purpose

This stage aims to initiate the change that the design set out to implement. The stage starts with a developed course and ends with a complete (or preferably ongoing) experience.

Getting it done: Do it Yourself

There is both an art and science to delivering training. So whether or not you believe you are a “natural-born teacher,” I encourage you to still study and practice expert facilitators' tried and true methods.

Do it Yourself Tips

- Practice, practice, practice – especially the first 30 minutes of the course. If you fumble at the beginning, it can be difficult to regain your footing.
- Remember that this experience is not about you. It's not about how well-versed you are in the topic or your war stories. Your role is to facilitate the learner's change. Keep the focus on them.
- See yourself as a facilitator of learning rather than the person who's delivering it. The course content is essential, but it is only a part of the experience. Learners also gain from discussion with you and amongst one another.
- If you do have a leader's guide or presentation notes, do not read from them. Only use it to help you remember the key points.
- Create a positive learning environment by having a supportive attitude, providing clear instruction, and being capable of diffusing situations that threaten the mood of your classroom.

Getting it done: Outsource

You can hire trainers or facilitators to deliver your courses. Some instructional designers also train courses, but many do not. Consequently, you may need to hire two people to complete a project that requires classroom delivery.

A professional trainer or facilitator can:

- Learn the content based on the leader materials and deliver it as intended
- Handle any classroom management logistics (i.e. tracking sign-in sheets, distribute and collect evaluations)

As with instructional design, training delivery is a repeatable process that can be used with any subject matter. Therefore, any trainer who understands this process can train any content for any audience, whether or not they have prior experience with the subject matter. But, this differs from instructional design in that the learners who are interacting with the instructor may prefer someone with experience in the subject matter; however this should be seen as a preference rather than a requirement.

Sidebar: Delivering eLearning or Blended Learning Experiences

Online learning is delivered via the Internet or Intranet. There are many options for delivering online learning experiences and several considerations to take into account.

Do it Yourself Resources

Online:

- [Training Toolkit – Training Delivery](#)

Outsourcing Considerations

Information to provide candidates:

- Length of the class and number of times it needs to be delivered
- Anticipated initial delivery date
- Whether subject matter experts will be available while the class is being conducted
- An estimate of the number of learners involved in the learning experience
- How will the instructor be allowed to prepare (i.e. on their own with a leader's guide or via a train-the-trainer session)
- How much time will the instructor have to learn the content

Questions to ask candidates:

- How much experience does the candidate have delivering courses?
- What types of courses has the candidate delivered?