# Instructors Guide

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.
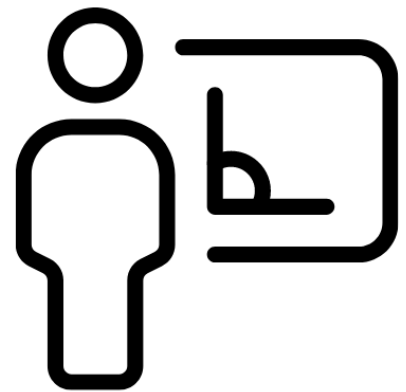
Module Two: Understanding Training and Facilitation

Depending on the need of your participants, you may be called upon to provide training, or facilitate a discussion of ideas. This module will help to determine which approach you need in a particular situation.

What is Training?

Your role as a the trainer is to encourage behavioral change in the participants. Training is not an event where we attend a workshop one day and expect the desired behavior to take place the next day. Training is a process. It begins before participants sign up for a class and continues until the new knowledge, skills, and attitudes are applied regularly.

Training includes:

| Identifying the need for learning to take place | Securing management buy-in for training to be developed | Creating participant-centered learning opporutnities | Evaluating the effectiveness of the training offered |

The purpose of training is to deliver results. We make training available when we want to improve performance in some way, because we believe that it will help to move our organization from where we are right now, to where we want to be.

Presenting is something that can take place in training or a meeting, and your presentation skills come with you. If you are one of those people that get complimented because you have great speaking skills, good pacing, and quality materials, then you already have great presentation habits. On the other hand, if you are someone that tends to mumble if you are tired, or you don't inject inflection into your voice, then you can develop those skills.

Sometimes trainers rely on their presentation skills to get a point across, but not all training is presenting. A lot of training is delivered in other ways, such as demonstration, case studies, exploration activities, games, and guided practice.

When do we need training?

Lack of performance does not always mean that there is training needed. There are several areas to consider BEFORE even looking at training as a consideration:

Determine the type of need.

- Is there a gap between high and low performers? If so, what is one group doing that the other isn't?

- Is there a real opportunity for improvement? We like to think, especially as trainers, that there is always something to learn and room for growth. In looking at the gap you have just identified, is there room for that growth to take place?

- When you have new products, equipment, or regulations, the indication for training may be very clear. Try to provide training early so that there is no slowdown in performance as the changes take place.

Who needs the training?

- Identify the level of the organization that is being impacted by the need you identified in Step 1. Problems or deficiencies can exist specific to an individual or to a job.

- Future planning may mean that an entire shift of people or an organization need training, which would be the case if you are opening a new plant.

Make sure that you need training.

- If the gap really exists because of performance issues, attitudes, or capacity for learning, then training is not what you need. Despite what we may like to think, we cannot train all people to do all things.

Do the systems support you?

- We can train people for all kinds of things, but if the systems in place don't support your training, performance will not improve. If Jean finishes her work every day by 3:00 in the afternoon, and you continually scan the office to see who is behind and give extra work to Jean, she just might eventually learn to make her work extend until 5:00 anyway, so that you stop giving her that extra work.

- Does Jean need training to improve her performance? Of course not. Jean was being punished for performing well since there was no incentive for getting more work done than everyone else. In addition to that, the other staff was being rewarded for their slower performance since Jean was picking up the slack.

- While her colleagues might benefit from training that helps them be more efficient, the other aspect to consider is that Jean needs an incentive to do more than the minimum daily expectations.

Would coaching suffice where training is considered?

- Sometimes people don't actually need a full training program. A supervisor with skill in identifying gaps and providing coaching could potentially provide the support that is needed in 10-minute sessions of focused coaching. Sometimes our employees just need their concerns addressed, questions answered, or a skill demonstrated.

- Sometimes we tell supervisors that they are now coaches, but they may not know how to coach. They may not understand what a powerful tool coaching is, and so it's up to you to help them. (Could your coaches/supervisors use some training?)

- On the job coaching (and training) can be a very good return on your investment, rather than long training sessions. Coaching can provide that "just in time" support that provides the employee with the information that they really need to move ahead.

Estimated Time	20 minutes
Topic Objective	To define training and presenting.
Topic Summary	Understanding your purpose for delivery will help you to design the best kind of program.
Materials Required	Flip chart paper and markers Worksheet 1: What is Training?
Planning Checklist	Remind participants that Worksheets are in the Appendix of their Training Manual.
Recommended Activity	Arrange participants in small groups of three to four to discuss the questions on their worksheet and find the answers in the workbook material. • How will you know if training is the right approach for a gap that you have identified? • List three skills that a trainer exhibits. • List three elements of a presentation.
Delivery Tips	Having more than one way to create groups for activities will allow more people to meet one another.
Review Activity	Ask participants to give examples of training versus presenting.

What is Facilitation?

Whereas a trainer can have knowledge that participants do not have, a facilitator may not have the same knowledge or expertise in the particular subject matter that the participants do. The role of the facilitator is to provide an experience in sharing, discussion, learning, and openness for participants. Although we may use the terms trainer and facilitator interchangeably at times, there are tangible differences.

Can you think of some possible differences?

Estimated Time	10 minutes
Topic Objective	To understand what facilitation is.
Topic Summary	Facilitation is a specific process that is different from training.
Materials Required	Flip chart paper, and markers

Recommended Activity	Ask participants to discuss the role of trainers and facilitators for five minutes, creating a list of distinct differences and similarities between the two. Possible answers could include: Trainers: • Bring about a difference in behavior • Focus on improving specific skills and learning new things Facilitators: • Allow for an examination of attitudes • Create an environment for participants to discuss, share, and explore
Delivery Tips	Circulate around the room to offer assistance and feedback, as participants discuss features of facilitation, training, and even presenting. When you bring the large group back together, ask them to share one or two

	points of their lists and record their answers on the flip chart.
Stories to Share	It is possible to have training and facilitation going on within the same "workshop" experience for participants. Knowing when to train and when to facilitate, however, are important distinctions for the trainer to make.

Identifying Appropriate Situations

A facilitator uses their knowledge of group processes and dynamics when planning their meeting. They might make use of their skills to run a meeting or a workshop where participants are considering problems, addressing pressing business needs, or planning for the future. Just like in skills training, a facilitator needs to have an agenda, specific objectives, and a plan for how the meeting will go.

Facilitating requires the following basic skills:

- Make sure everyone participates

- Make sure everyone understands and focusses on the problem(s) being addressed

- Protect participants from any kind of backlash or abuse by creating and maintaining a safe environment

Provide regular check-ins and follow-up within the session. When people get involved in a facilitated group, they need to know whether they are still on track and that they are making progress. In addition, they need frequent interaction with the facilitator to inject energy, keep them on track, and also to allow some of what they do to sink in.

One way to bring it all together is to check in with the group and record their progress on a large flip chart or whiteboard at the front of the room. This will facilitate guided discussion, mind-mapping, and exploration. Keeping the group focused and together in this way also helps to foster the cohesiveness of the group.

Estimated Time	15 minutes
Topic Objective	To develop skill in determining the right approach.
Topic Summary	Whether you use training or facilitation depends upon the purpose of your meeting, as well as the desired outcomes.
Materials Required	Worksheet 2: Identifying Appropriate Situations

	Flip chart paper and markers
Planning Checklist	Remind Participants that Worksheets are in the Appendix of the Training Manual.
Recommended Activity	Have participants work through this exercise in pairs or small groups. Some statements should generate more discussion than others, and in some of them it could easily be argued that both training and facilitation might be needed. However, if they answer the questions without over-thinking their answers, you should see answers similar to those below. 1. FACILITATION will bring the group together, re-energized and focused on the project. 2. FACILITATION will help to bring the group back together. However, if the facilitator is not getting buy-in from colleagues because he/she lacks skill in assertiveness, he/she may benefit from some TRAINING. 3. TRAINING will address the skill development for the new equipment. 4. TRAINING employees who are new to the plant and the company. 5. FACILITATING when the finance team that knows all about budgeting and forecasting need to work together to develop a new process.
Delivery Tips	Have the small groups debrief in larger groups, or among the entire group depending on your class size.

Practical Illustration

Jordan watched as his team members milled about with no idea where to begin. Nick and Annie looked like lost souls with no direction. Jordan knew the time had come to corral the troops and make some sense of all that their jobs entailed. With a wave of his magic wand and keen eye for proper training, Jordan waxed poetic and explained all that they were expected to do in finite detail, leaving no stone unturned. Soon, everyone had a clear grasp of the concepts and had a plan of action to succeed. Jordan made no bones about it. They would forge ahead as one or disintegrate as many. Everyone understood that the job had to be done and now knew exactly how to make things happen. The former clueless bunch were now top-notch movers and shakers and the company leaders were elated with how quickly they caught on and how swiftly Jordan whipped them into tiptop shape.

Module Two: Review Questions

1.) Which of the following is not a part of training?

    a) Identifying the need for new learning to take place
    b) Creating trainer-centered learning opportunities
    c) Evaluating the effectiveness of the training offered
    d) Securing management buy-in for training to be developed

    Training includes: Identifying…, Evaluating…, Securing…Creating **Participant** centered learning opportunities

2.) Which of the following is the key for a successful trainer?

    a) Presentation skills
    b) Case studies
    c) Games
    d) All of the above

    A lot of training is delivered in other ways, such as demonstration, case studies, exploration activities, games, and guided practice

3.) Which of the following questions can help you determine the type of training needed?

    a) Is there a real opportunity for improvement?
    b) Is there any gap based on performance issues?
    c) What are the organization's future plans?
    d) When do we need training

    Determine the type of need - Is there a real opportunity for improvement?

4.) Which of the following is **not** crucial when determining whether or not training is necessary?

    a) Where is the training going to be held?
    b) Do the systems support you?
    c) Would coaching suffice where training is considered?
    d) Do you need training

    Determining the place for the training is not crucial at this point

5.) Which of the following statements is true?

    a) A facilitator is the person who has the same or similar skills as participants
    b) Facilitators and trainers have the same function.
    c) Facilitators are prominent participants.
    d) Facilitators may not have the same knowledge or expertise in the specific subject matter as the participants.

Whereas a trainer can have knowledge that participants do not have, a facilitator may not have the same knowledge or expertise in the particular subject matter that the participants do.

6.) Which of the following is not a part of facilitator's role?

    a) Providing experience in sharing
    b) Helping participants with discussion
    c) Giving participants final solutions
    d) Helping participants with learning

The role of the facilitator is to provide an experience in sharing, discussion, learning, and openness for participants

7.) The goal of training is to bring about a _____ change.

    a) Critical
    b) Behavioral
    c) Personality
    d) Financial

Your role as a trainer is to encourage behavioral change in the participants.

8.) A facilitator uses their knowledge of _____ _____ and dynamics when planning their meeting.

    a) Large whiteboards
    b) Personal journals
    c) Staff meetings
    d) Group processes

A facilitator uses their knowledge of group processes and dynamics when planning their meeting

9.) When people get involved in a facilitated group, they need to know whether they are still on track and that they are_____ _____.

    a) Making money
    b) Making progress
    c) Speaking clearly
    d) Asking the proper questions

When people get involved in a facilitated group, they need to know whether they are still on track and that they are making progress

10.) Provide regular _____ and follow-up within the session

    a) Breaks
    b) Meals
    c) Stories
    d) Check-ins

Provide regular check-ins and follow-up within the session

PowerPoint Slides

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.
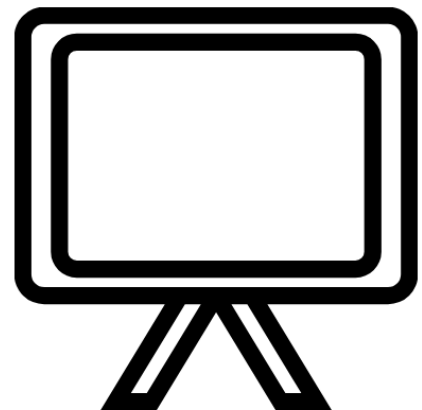
> " *Knowing is not enough; we must apply. Willing is not enough; we must do.*
>
> Johann Wolfgang von Goethe

Understanding Training and Facilitation

Depending on the need of your participants, you may be called upon to provide training, or facilitate a discussion of ideas.

What is Training?

Training is a process. It begins before participants sign up for a class and continues until the new knowledge, skills, and attitudes are applied regularly.

What is Facilitation?

The role of the facilitator is to provide an experience in sharing, discussion, learning, and openness for participants.

Identifying Appropriate Situations

When people get involved in a facilitated group, they need to know whether they are still on track and that they are making progress.

Practical Illustration

- What is Training?
- What is Facilitation?
- Identifying Appropriate Situations

Module Two: Review Questions

1. Which of the following is not a part of training?

A. Identifying the need for new learning to take place

B. Creating trainer-centered learning opportunities

C. Evaluating the effectiveness of the training offered

D. Securing management buy-in for training to be developed

Quick Reference Sheets

Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Train-The Trainer
Quick Reference Sheet

Types of Activities

Trainees expect that training will be stimulating, interesting, and yes, fun. That does not mean that you have to be a comedian (unless you are, of course, hosting a stand-up comic's training workshop), but it does obligate you to incorporate some activities into your training that help to engage your learners.
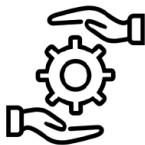
Fun keeps the day moving at a stimulating pace.

Fun helps to bring people together and break down barriers.

Laughter leads to a healthy release of endorphins.

Laughter improves retention of material by providing hands on application and practice.

Using Group Work

In order to make group activities work for you as a trainer, here are some tips:

Provide the group with clear directions, points to discuss, or case studies to keep their work focused.

Make sure that you have all the needed materials for group work to start on time and be most effective.

Circulate around the room, keeping groups on track and offering assistance or refocusing when needed.

The Power of Sticky Notes

Sticky notes don't just add color to your presentation; they can also add value as a visual aid. A few ideas for using sticky notes in a presentation:

Write just one idea per note.

Place smaller sticky notes on participant tables so that they can use them to highlight memorable information throughout your workshop or use them as a bookmark.

If you are using sticky notes at the front of a room, make sure you use saturated color markers and write in the same size letters you use on your flip chart or whiteboard.

Keep the wording of your ideas concise.

Handouts

Each course is provided with a wide range of worksheets.
Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.
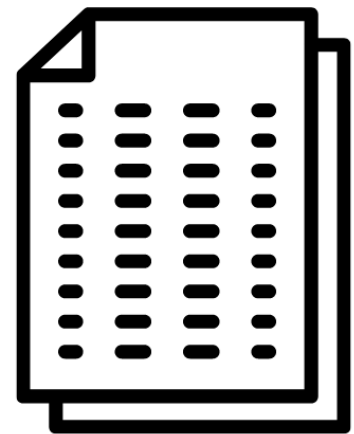
Sample Worksheet 1

What is Training?

How will you know if training is the right approach for a gap that you have identified?

_____

_____

_____

_____

List three skills that a trainer exhibits.

_____

_____

_____

_____

List three elements of a presentation.

_____

_____

_____

_____

Sample Worksheet 2

Identifying Appropriate Situations

Facilitation is a specifically different skill than training. Review the list of examples below, and determine whether the topic is best addressed through training or facilitation. Be prepared to discuss your decisions with the group.

| SCENARIO	TRAINING?	FACILITATION?
A project seems to have stalled and participation is dropping off because people have either lost interest or moved onto other work.		
An individual working on a project seems to be having problems getting commitment from other team members, and is now late on a couple of deadlines.		
The project group has begun to work together; however, there are several members of the team who need to learn to use the new equipment before it is installed.		
A new production plant will open in six weeks, and 55 staff members will be new to the company as well as to the plant. There will be six senior staff transferred from an existing division of the company. What can the new staff expect?		
Your company has decided that a new process for budgeting and forecasting is required. The financial services team will be responsible for developing a new process.		

Icebreaker Three: Related Topic

Include a short activity here that is related to the topic of the workshop. You can use the one below if you like.

1. Have the participants at each table answer the following questions:

    a. Why are they here?

    b. What is their level of experience with training the trainer?

    c. What they hope to get from this class?

    d. What was their most memorable vacation or trip?

2. Have someone be designated a scribe and have them jot down the answers to question C above.

3. On a separate piece of paper, have the scribe write down the most interesting or exotic vacation or trip from only one table member.

4. Have the scribe hand the note with the answers to question C to you.

5. Have the scribe stand and introduce the table to the class.

6. Then have the scribe share the most interesting vacation or trip from their group.

7. Have the class guess the person that had the most interesting or exotic trip or vacation.

8. Go around to each table until all have given you their answers to question C and shared their most interesting trip or vacation.

9. Debrief by sharing all the answers to question C with the class.

10. Thank participants for sharing.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.
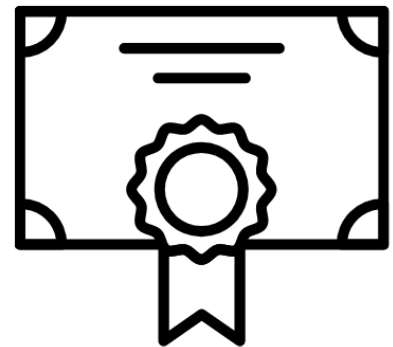
CERTIFICATE OF COMPLETION

[Name]

Has mastered the course
Train-The-Trainer

Awarded this _____ day of _____ e _____, 20 _____

_____
Presenter Name and Title