Trainer Workbook

Keep it simple

Less is more

Liselot Bomers & Lianne Kaufman

in collaboration with the

European Association for International Education

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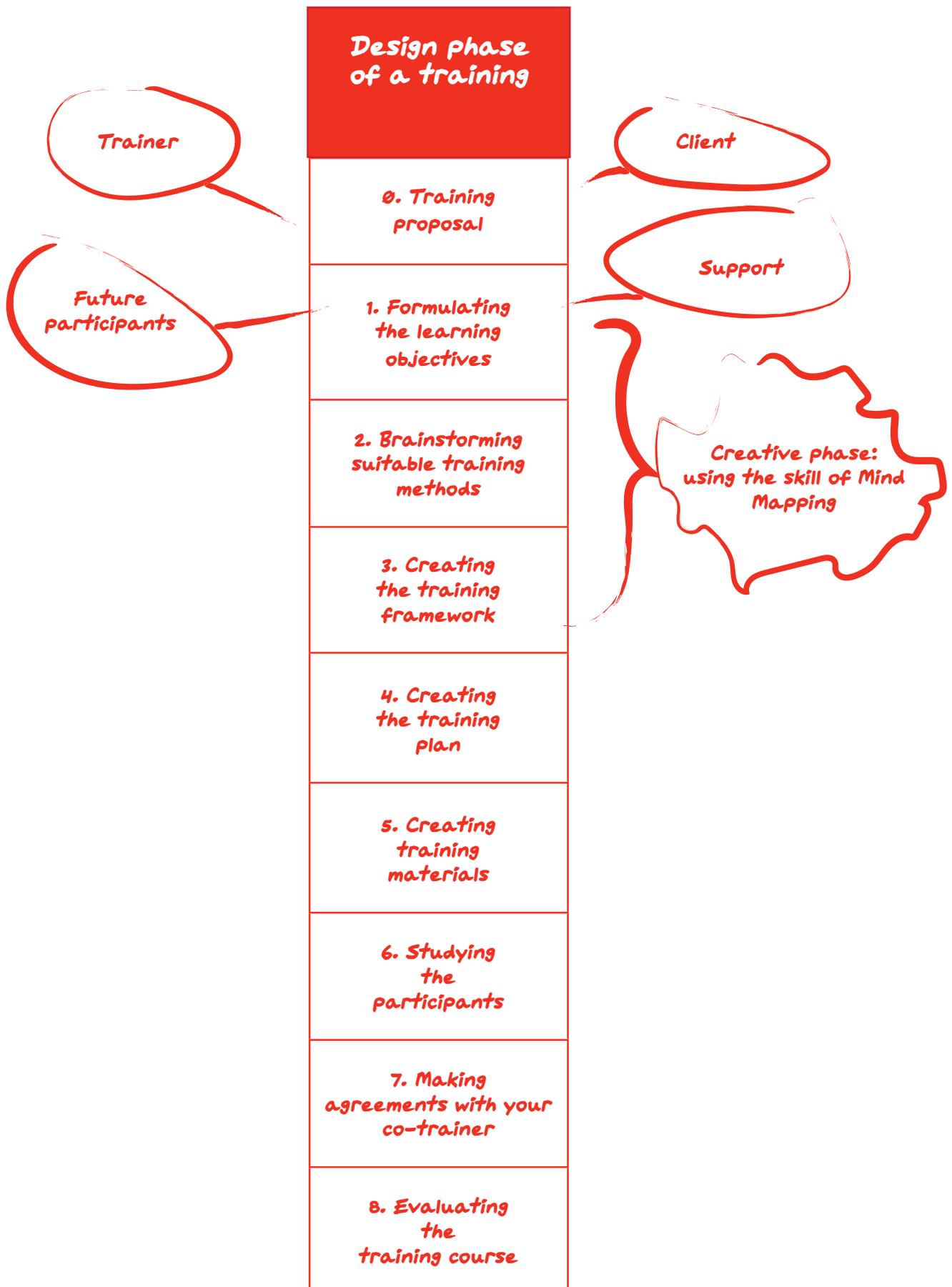# About this workbook

Why a workbook

This workbook is a tool to help you design effective and appealing trainings. It is based on many years over delivering successful Train the Trainer Programmes and the book 'Secrets of the Trainer' (Het Geheim van de Trainer). Lianne Kaufman & Liselot Bomers have customized and translated the main lessons for trainers in collaboration with the European Association of International Education.

Eight steps of designing a Training Course

This workbook will take you through the key principles and core practises of the craft of designing trainings in eight steps. For some of you these steps are very familiar, for others the approach is new. The workbook is especially meant as a useful tool in designing new training courses, however, it could also be used to redesign an existing course.

The workbook delivers proven ideas and solutions from expert trainers. It starts with formulating learning objectives. This first step is crucial, so you will be taken through the process of formulating learning objectives in great detail.

The next chapters capture the following steps of the design process:

Design phase of a training

Trainer

Client

Support

Future participants

Creative phase: using the skill of Mind Mapping

0. Training proposal

1. Formulating the learning objectives

2. Brainstorming suitable training methods

3. Creating the training framework

4. Creating the training plan

5. Creating training materials

6. Studying the participants

7. Making agreements with your co-trainer
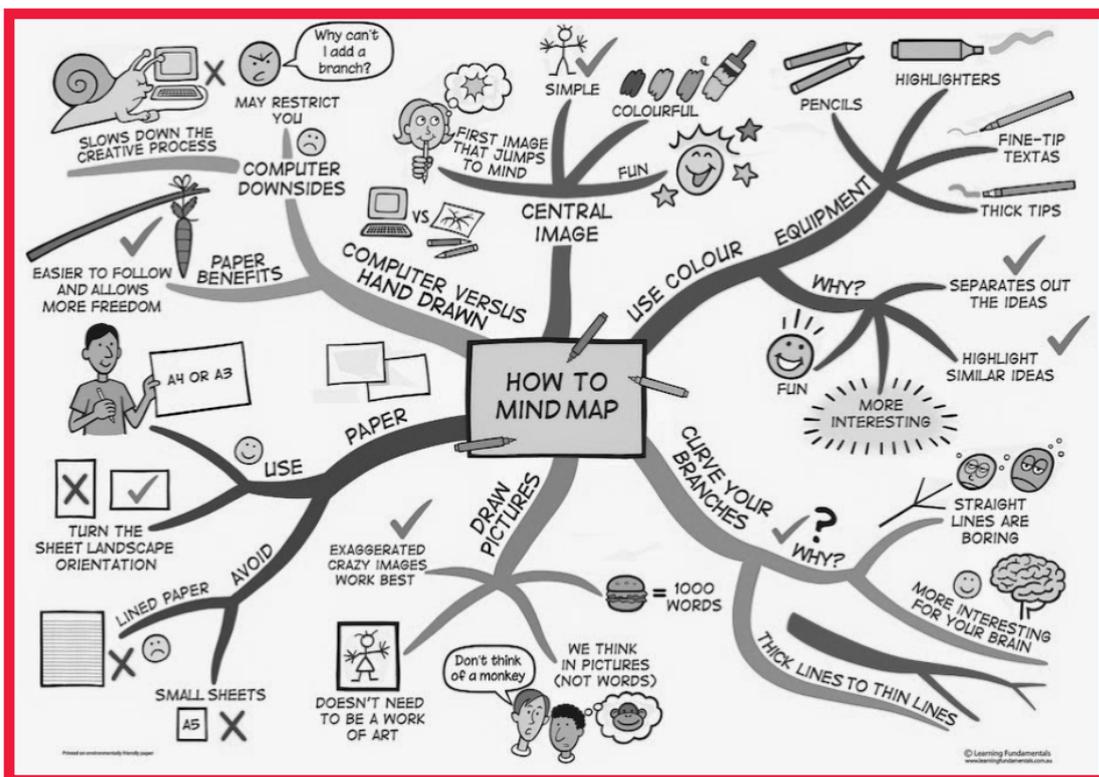
8. Evaluating the training course

How to use this workbook

The authors aimed to translate the expertise of seasoned professionals into practical "how-to" guidance on the designing issues. In each step you will be asked key questions and given an example of a mock up training course with the title 'Leadership & Communication'. After each example you will have the opportunity to immediately try it out with your own material.

Designing a training course is a creative process. The most ideal condition for creativity is one in which you are mentally stimulated with a task, but at the same time are free to explore possibilities unhindered. This workbook is designed in such a way that you can do the exercises by yourself and afterwards - or halfway through it - share your ideas and outcomes with your co-trainer. We invite you to allow some time and fun to create a clear common vision on the course, before you start working out the details. We recommend you to make sure you go through these important thought processes, and decide together how to keep each other informed.

To get the most out of the workbook, try to follow the chapters chronologically. You are advised to print the workbook and take it to a place where you feel relaxed and are able to focus. Make sure you have some colourful pens and pencils and preferably no electronic devices around that can distract you. The creative tool of Mind Mapping is used regularly in this workbook, so take note of the Mind Map below for inspiration.

Getting started

In the training book 'Telling ain't Training' by Harold D. Stolovitch and Erica J. Keeps, the following question is raised:

"What do you focus on whilst preparing for a training?"

Is it:

A. You will read and collect as much relevant information on the subject. You will study and make sure to understand the main concepts and theories. You will summarise the key lessons, learn them by heart and put together a power point with all the important information.

or

B. You spend your time thinking about the possible participants of your course. What should you know about them? How do these people enter your course and how do you want them to leave? What experience do you want to give them and why? What is in it for them? What should they be able to know, understand or do after your training course?

Most subject matter experts and trainers when honest will state answer A. The focus is on the content of their subject. It makes sense to most of us, to tell our audiences all there is to know about a subject matter, since we are passionate about it.
Whilst our impact relies mostly on answer B. Having a clear objective and a good understanding of what participants really need and want to learn. Training is, fundamentally, about understanding your audience.

"The purpose of training
is people getting
impressed with
themselves
instead of
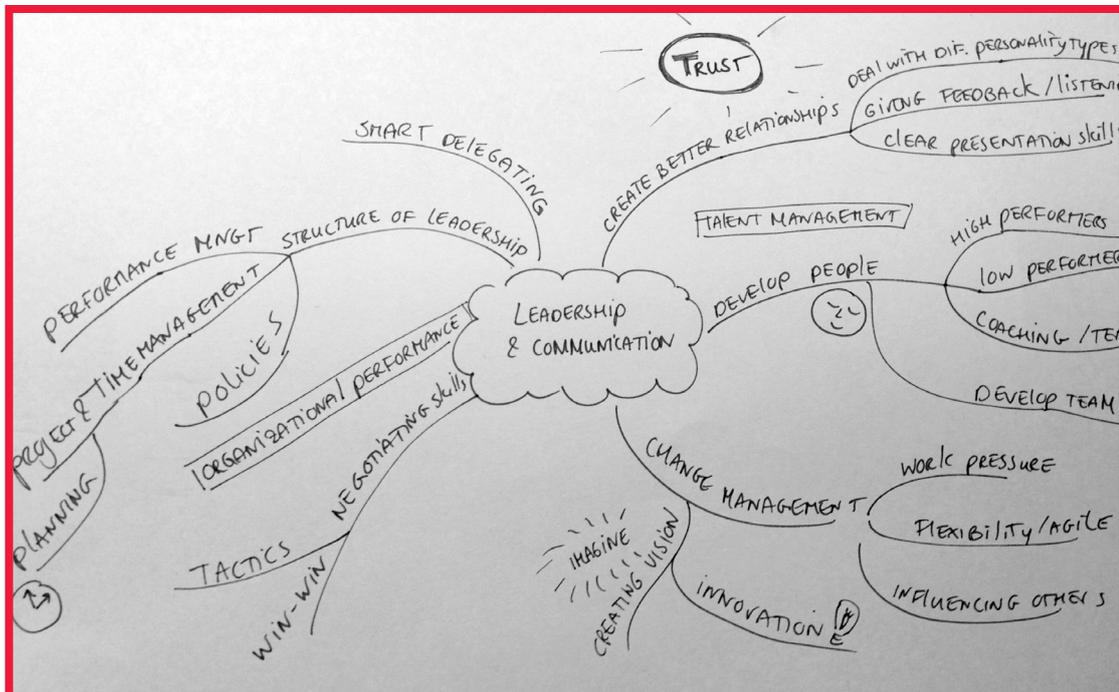overwhelmed
by the trainer."

Bob Pike

Please start the designing process by first emptying your mind

To design an effective and appealing training for your target audience you often need the courage to let go of your own ideas of what should be covered in the training. You will need to listen carefully to participants and your client, and search for what they need in order to learn in the training setting. Too much content is often a burden. Training is about selecting carefully, and making decisions on what content to include.

To help you reduce unnecessary content it is important to first clear your mind by collecting all primary thoughts and ideas on your training course. Once written down, there is room again in your brain for new ideas to come to mind. How do you do that? By creating a mind map. As an expert in the field, you can easily plot down all content related topics that first come to mind. You can use the graphic on the next page for this.

Workbook example: Mind Map 'Leadership & Communication'

CHAPTER 1

Formulating the learning objectives

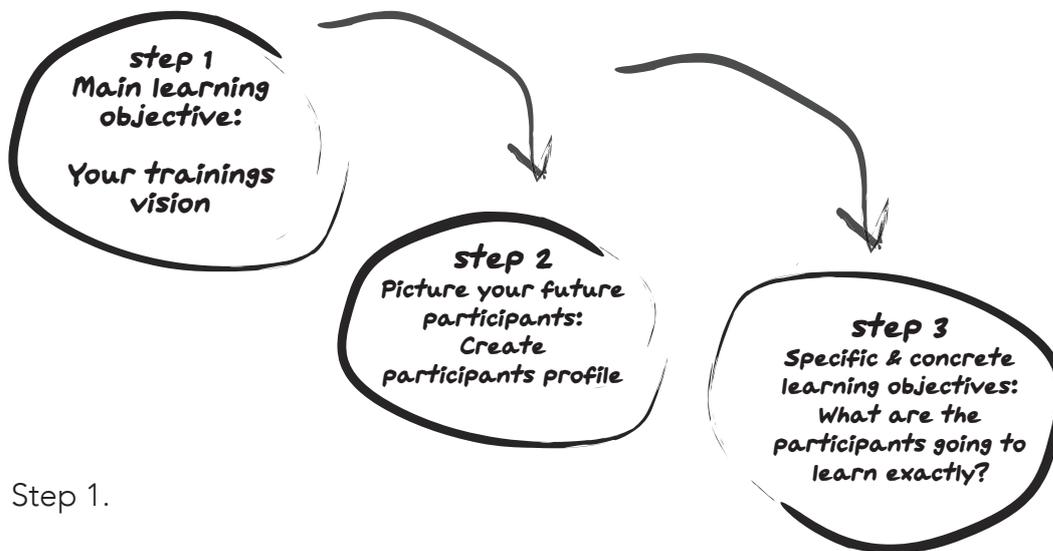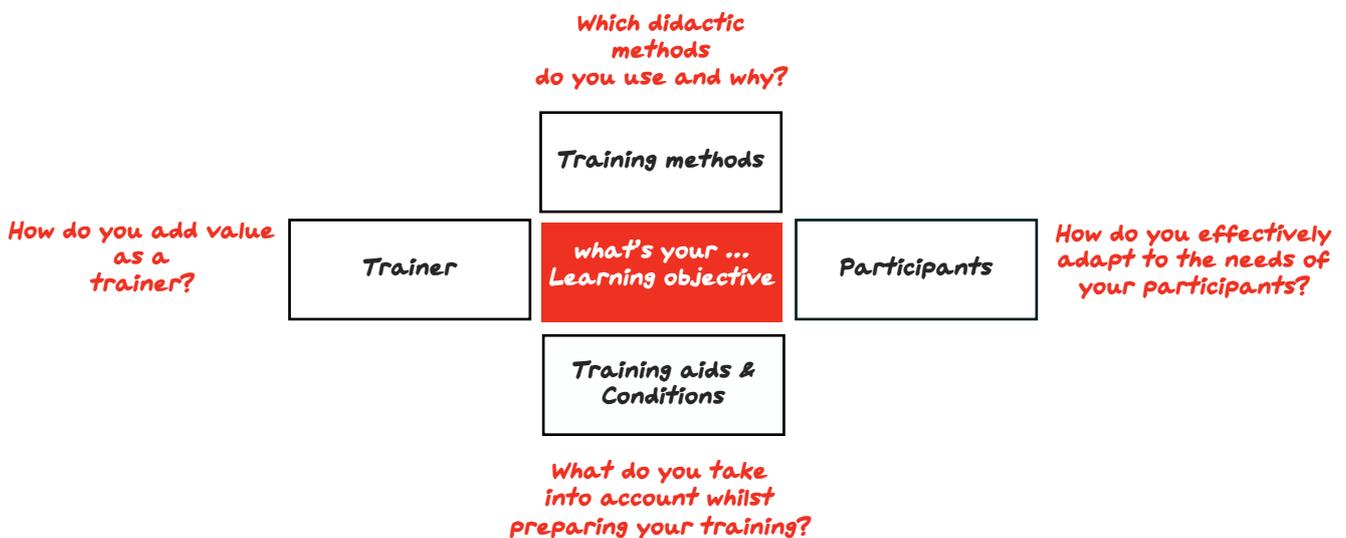In this chapter we will formulate the concrete learning objectives in three steps.
We also recommend trainers who have already delivered their training course to follow these steps again, to critically review and evaluate the existing learning objectives.

step 1
Main learning objective:

Your trainings vision

step 2
Picture your future participants:
Create participants profile

step 3
Specific & concrete learning objectives:
What are the participants going to learn exactly?

Step 1.

What is your main learning objective?

A training course consists of five key ingredients. Understanding these ingredients gives you an overview of what is important whilst building and delivering the training.

Which didactic methods do you use and why?

Training methods

How do you add value as a trainer?

Trainer

what's your ... Learning objective

Participants

How do you effectively adapt to the needs of your participants?

Training aids & Conditions

What do you take into account whilst preparing your training?

Crucial to formulating good learning objectives is that the main objective ought to be really clear. You need to be able to define specifically what your participants need to learn, otherwise you will never know whether or not your training course will be successful. In your proposal with future clients, you have outlined your global training outcomes.

Question: What main objective did you agree upon in your training proposal?

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Workbook example:

The main objective of my 'Leadership & Communication' course is:
– To strengthen manager's abilities to motivate others and drive results in their teams.

My vision is that managers leave the training with concrete ideas and inspiration on how to develop themselves and build a team designed to produce the behaviours and results they desire.

Step 2.

Create your first participants profile

Now think about your future participants. Even if you do not know exactly who will sign up for your course you can profile them. What you need to do is to try to empathize as much as possible with your potential target group. Try to picture the group based on your own experiences and expectations and then answer the following questions in as much detail as possible:
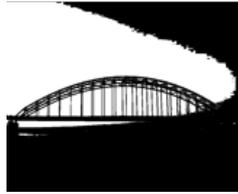
Question: What do you know about your target group/ future participants?

_____

_____

_____

_____

_____

Question: What would you like to happen to them in your training? What is your vision?

_____

_____

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_____

Question: How do they arrive ?

Training is the bridge

How do you want them to leave?

_____

_____

_____

Question: What do you definitely want to know in advance about your participants?

_____

_____

_____

How do you want to gain this information?
(Written or personal intake, at the start of the training, etc)

_____

_____

_____

Workbook example:

My participants (max of 20) are all managers working within internationalisation of higher international education. These managers have some experience in the job. They will be running a team of about 4 to 8 people. Their biggest concern is how to prioritise and lead others. It is currently a time of high work pressure. I believe they would enjoy practical tools and personal feedback on how they could motivate others and practise with other essential leadership skills. I should give them plenty of opportunity to exchange notes and share best practises with colleagues. I would like them to leave my training feeling inspired with a clear sense of what driving for results means in their situation and how to implement the main principles of clear communication. In advance I need to know more about:
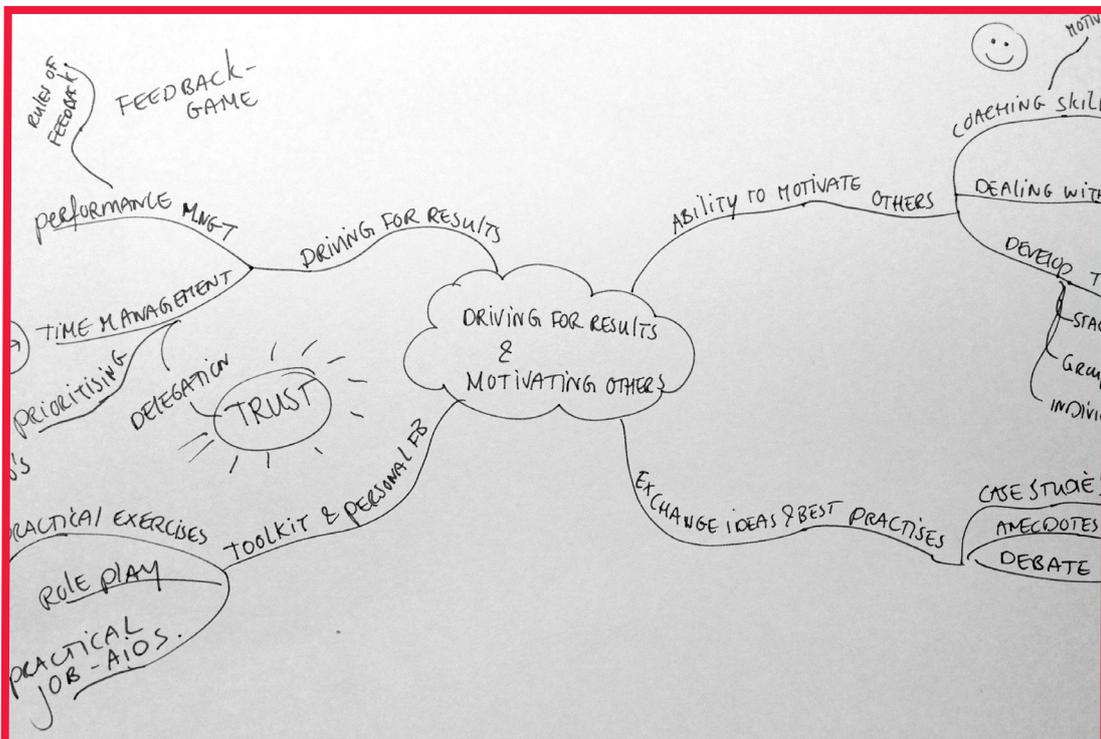*- Backgrounds, work experience and their specific learning needs*
- I would also like some input for a possible case study or role - play

Now, go back to your first mind map and circle the parts that are aligned with the main learning objective and your answers to the section on creating your participant's profile.
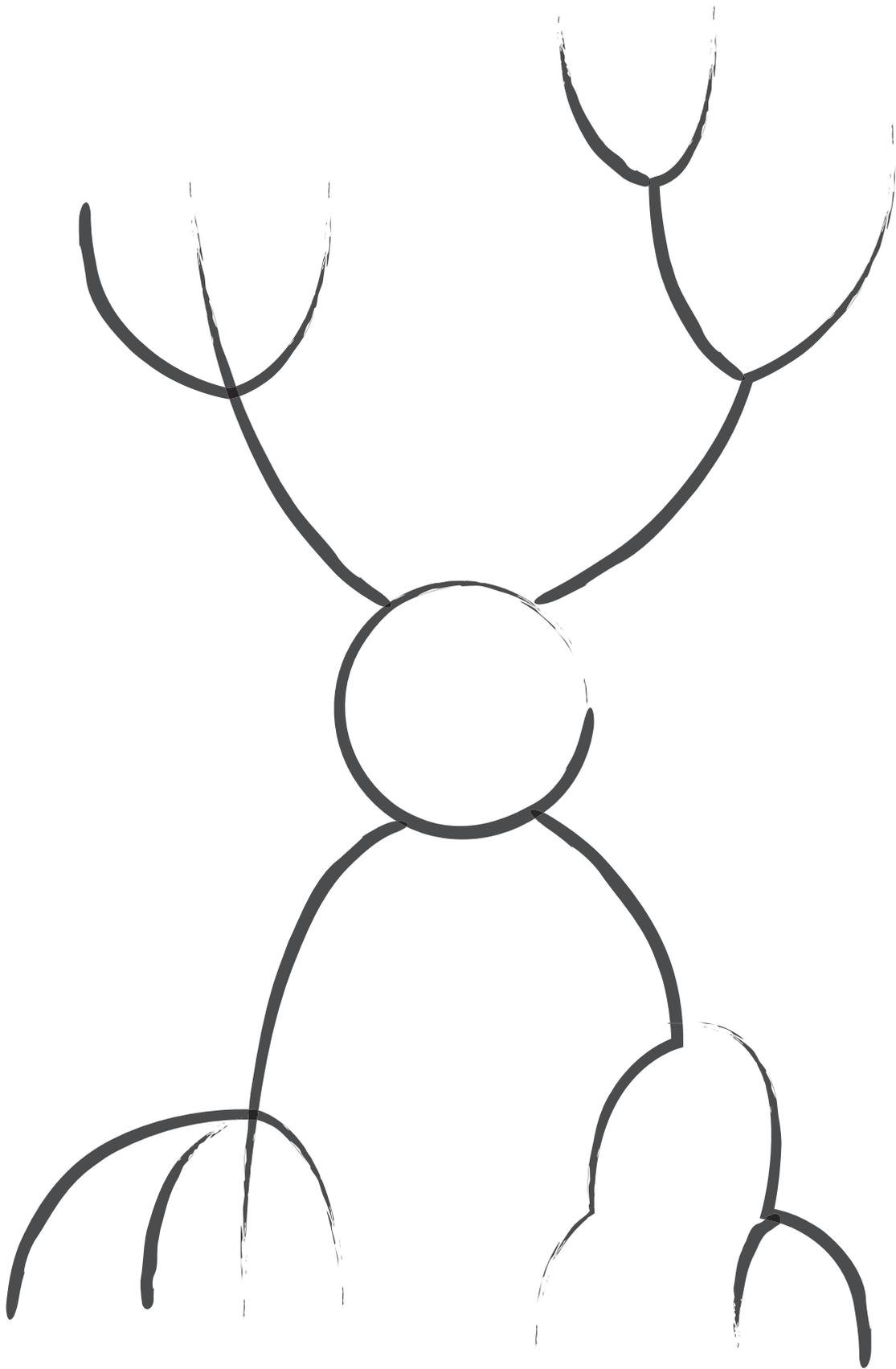
Workbook example:

Make another Mind Map based purely on your main objective and the participant's profile.

What comes to mind now? What is really relevant for this group considering the main objective?
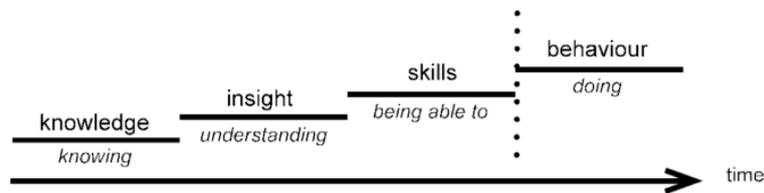
Workbook example:

Step 3.

Continue to formulate specific and concrete learning objectives

Once you have decided upon the main learning objective and empathized with your future participants, by having formulated what you want them to take out of the training, you are ready to take the next steps. Your specific and concrete learning objectives enable you to select the right type of content and main lessons of your training. It will make it possible to continuously manage expectations throughout the training and give you the opportunity to evaluate the training results. You formulate the learning objectives not only for yourself, but also for your co-trainer, your client and last but not least for your participants and their managers. Formulating specific and obtainable learning objectives is a real skill. To help give this clarity, use the following 'learning objective hierarchy'

√ Knowledge level: participants will learn something new during the session or course.
√ Insight level: participants will gain a deep understanding on why something is as it is.
√ Skills level: participants will gain a new skill that they will be able to immediately apply in a context outside of the course.
√ Behavioural level: participants will change their behaviour based on the key points addressed in the course in their daily practise.

As we move from knowledge level to behaviour, the time needed in order to achieve these learning objectives increases. It is difficult to reach behavioural change in a 2 to 2,5 day training, so make sure you formulate each learning objective on the first three levels. That's how far your responsibility as a trainer reaches.

Repeat your main learning objective. the main purpose of the training is:

_____

_____

_____

Now use the input of your mind maps to answer the following questions:

Question: What are the specific learning objectives?

Within your training course which main topics do you think you should cover to reach the main learning objective? Look at your mind maps and write down these topics and summarize them in key words / bullet points.

_____

_____

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Workbook example:

The main objective of my Leadership & Communication Course is:
– To strengthen manager's abilities to motivate others and drive results in their teams

Specific learning objectives:
– Driving for results: time and performance management skills
– Motivating others: coaching skills, dealing with different personality types

Question: What are your concrete learning objectives?

This level can be clarified by using the learning objective hierarchy. With this hierarchy in mind, contemplate what your participants really should "know", "understand" or "are capable of", when they finish your training program. And realise the time constraint. Meaning that when you are training on "insight" and "skill" level, you will need to drastically narrow down the amount of learning objectives to make sure you allow enough time for practising and interaction.

	Checklist – concrete learning objectives
What do your participants need to know? _____ _____ _____ **What do your participants need to understand?** _____ _____ _____ **What do your participants need to be able to do?** _____ _____ _____	Objectives need to be clearly formulated. Basically, you need to be able to have the programme in mind and run through it, if needed. **Ask yourself:** · What do you want to accomplish with this group? · What do participants need to learn exactly? · How do you know whether you have realised it? · How will you demonstrate and evaluate this? · How interesting is this goal for your participants? · How does it tie into their expectations and responsibilities in their daily lives? · How realistic is it for you to reach these objectives in your training? · Is it feasible/ realistic to achieve all desired learning objectives in 2 to 2,5 days?

Workbook example:
The main objective of my "Leadership & Communication" course is:
– To strengthen manager's abilities to motivate others and drive results in their teams

My specific learning objectives are:
– Driving for results: Time – and performance management skills
My concrete learning objectives are:
√   *Managers understand their main priorities and goals of the year*
√   *Managers understand which tasks to delegate and have the tools to do so in an effective way*
√   *Managers understand the performance management cycle and are able to name the ins and out of an annual review meeting*
√   *Managers are capable of giving and receiving feedback (feedback model)*
– Motivating others: Coaching skills and dealing with different personality types
My concrete learning objectives are:
√   *Managers are able to use basic coaching techniques, such as listening, summarising and asking through*
√   *Managers understand the different personality types (work of Jung)*
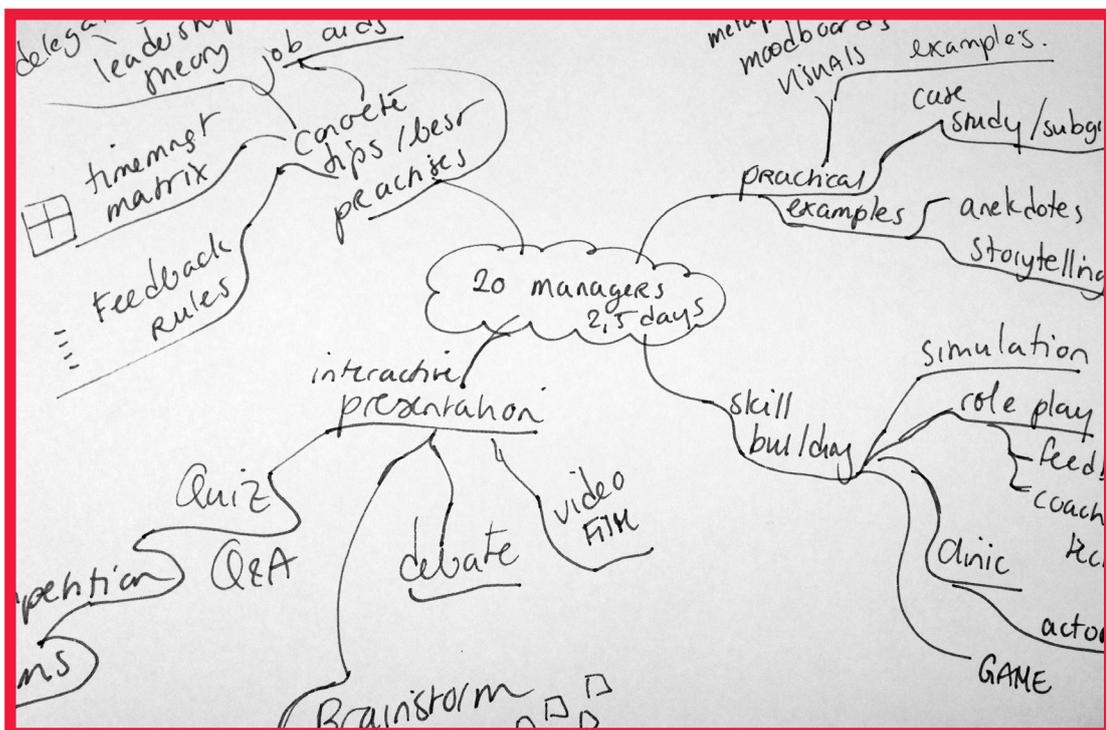
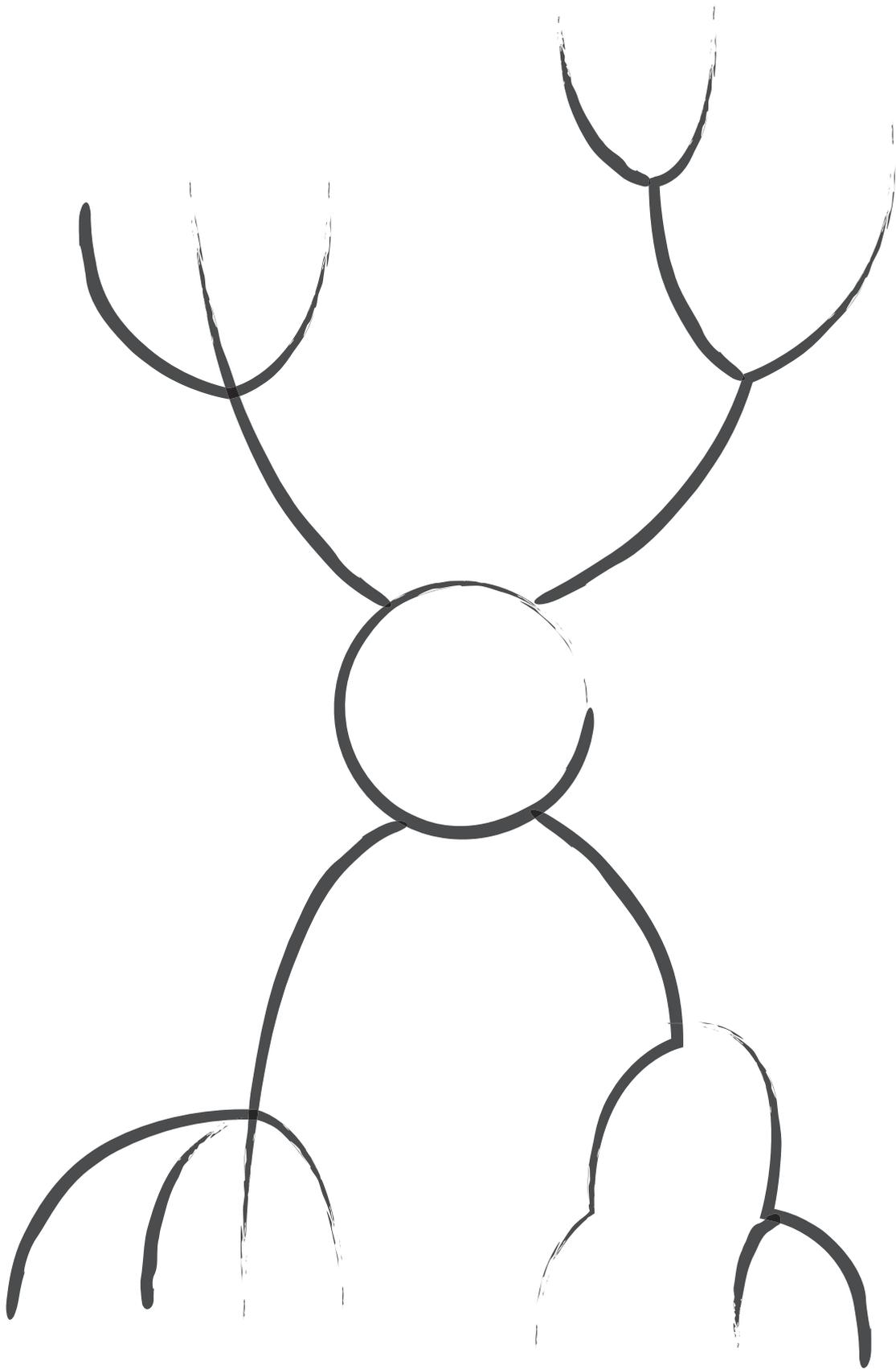# CHAPTER 2

Brainstorming suitable training methods

Now, brainstorm training methods using another mind map.

Before you choose training methods in relation to your learning objectives, it is recommended to first focus on brainstorming on training methods in general. By doing so you will explore and force yourself to 'think out of the box', and avoid being drawn towards the usual methods, such as a power point presentation or working with a case study. Whilst brainstorming, try to keep your participants in the back of your mind. Make sure that what participants learn today is directly applicable in their work place tomorrow. And always remember that adults learn best when they can go through the whole learning cycle of Kolb, preferably starting with experiencing. So how do you think your participants would like to learn? Name all training methods that you can think of and plot them into a mind map on the next page.
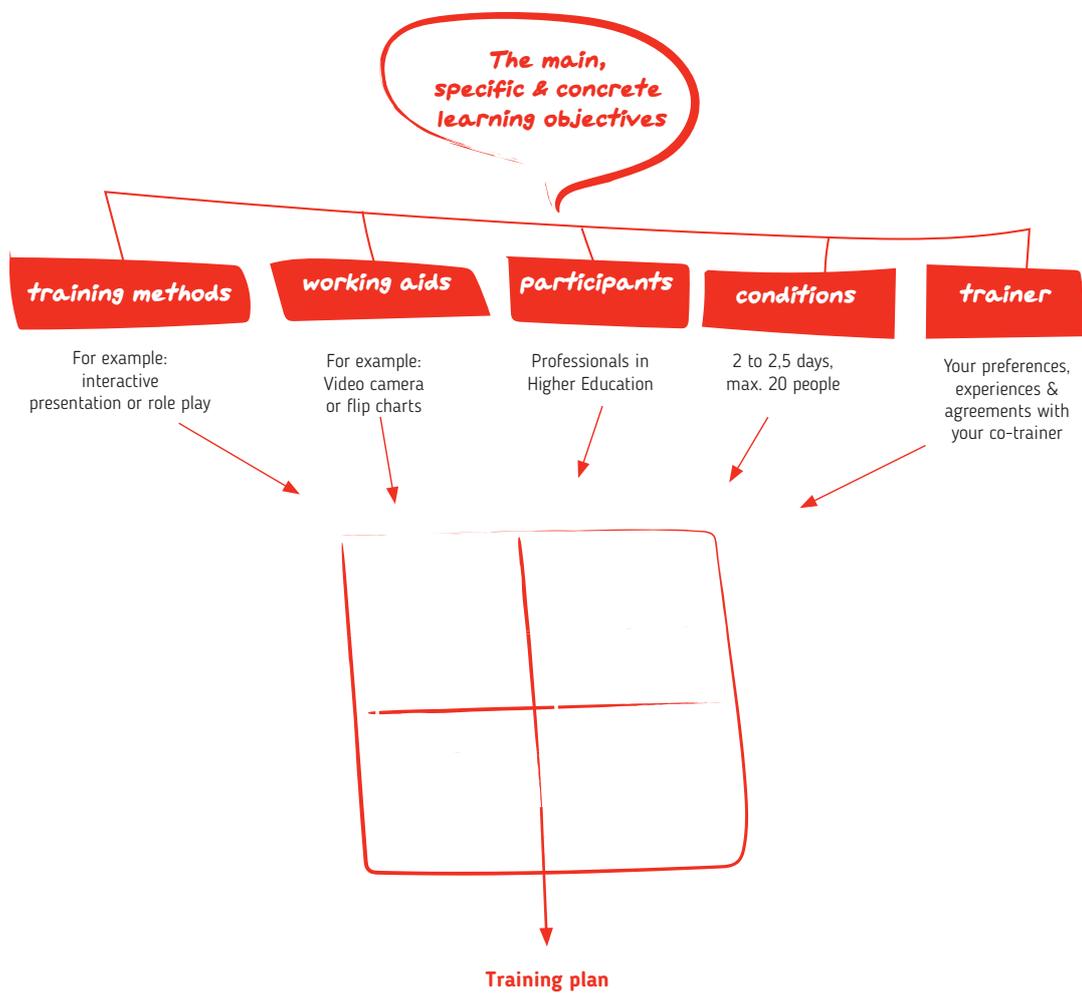
Workbook example:

CHAPTER 3

Creating the training framework

You have now done enough creative thinking: you have formulated the learning objectives and listed possible training methods. It is time to put them together into a first overview of the training, the so-called: 'Training framework'.

The main, specific & concrete learning objectives

training methods

For example: interactive presentation or role play

working aids

For example: Video camera or flip charts

participants

Professionals in Higher Education

conditions

2 to 2,5 days, max. 20 people

trainer

Your preferences, experiences & agreements with your co-trainer

Training plan

Programming: From learning objectives to your training plan

It is important to realise that certain conditions may already be set by your
client and can not be changed by you as the trainer. For example: the number of partici-
pants, the location and the time line. Your freedom lies within choosing effective and fun
training methods and aids.

Start by filling in the framework and keep a broad
perspective. Try not to focus too much on the details
yet. Use template 1 'training framework'

Workbook example:

Do the first check of your framework:

√   How does this overview bring you to your main learning objective?
-      Does it make sense?
-      Is it aligned with your ambition? Enough ambition? Too much?
-      Have you thought about your audience and their preferences?

√   Does the programme schedule make sense? Is there a good flow in the programme?

√   Scan your training methods and ask yourself: have I added in enough 'action learning' and a variety in learning methods?

Use sticky notes, and play around with the different parts and exercises until you are satisfied.

Day 1

Learning objective	Training method
Start	
Lunch	

CHAPTER 4

Creating the training plan

√ Only when you are very certain of your training framework, you should start to add columns and work out a more detailed training plan.

√ A training plan contains the following:

Timeline	Subject	Learning Objectives	Methods & Materials	Co-trainer Agreements

Next start working on your training plan.

Do the first check of your training plan:

1. Learning objectives	Are they clear? Does the summary of the concrete learning objectives lead to your main objective?
2. Number of Topics	Did you select enough materials? Are they challenging? Theory? Examples?
3. Variation in training methods	Have you chosen appropriate training methods for these participants?
4. Design of training methods	Do you and your co-trainer have good knowledge and experience on how to use the chosen training methods?
5. Level of detail	Do you have, for each part, clarity on why, what and how you are going to train? And can you answer: what's in it for your participant?
6. Time plan	Is the training plan realistic? Do you have enough space for input of participants and for breaks?

Workbook example:

Overview Day 1. Driving for results:
Time- and performance management skills
√   *Managers understand their main priorities and goals of the year*
√   *Managers understand which tasks to delegate and have the tools to do so in effective way*
√   *Managers understand the performance management cycle and are able to name the ins and*
          out of a annual review meeting
√   *Managers are capable of giving and receiving feedback (feedback model)*

Workbook example of a training plan (part of day 1)

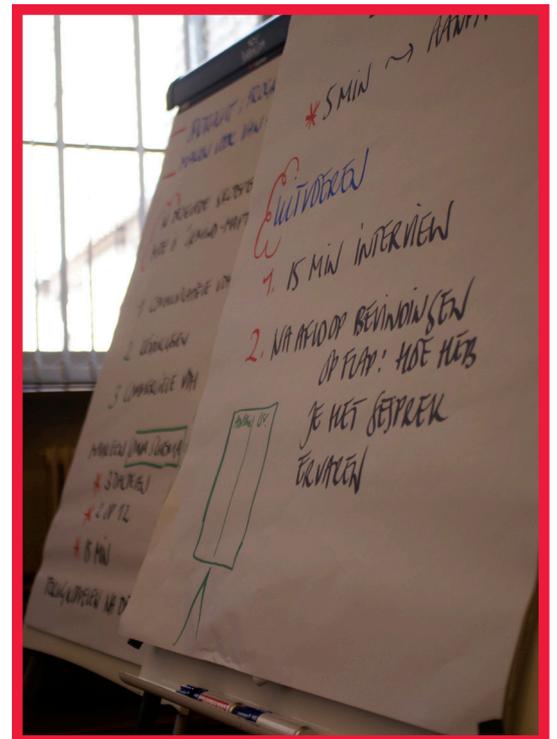| Times	Subject	Learning Objectives	Methods & Materials	Co-Trainer Agreements
09.00	Opening Goal & What's in it for me? Agenda Way we work Practicalities Ground rules	Goals are clear and expectations of training are managed Create a good learning atmosphere	Interactive presentation by Trainer Flip – Charts	Lead trainer
09.10	Introductions	Getting to know each other & focus on today's subject Understanding and sharing learning objectives	Interview in couples Short presentations	Co – Trainer writes down learning objectives on flip chart
09.45 / 10.00	Key elements of leadership – Directing, aligning and creating commitment	Understanding the key elements of successful leadership Understanding of Management program Key aspects are linked to the common themes of training	Explanation by trainer First leadership exercise: Participants build a paper tower in 2 teams Each participant once in leadership role A-4 paper, paperclips	In 2 small groups
10.45	Debrief	Personal feedback, based on three components of leadership	Discussion & conclusions Conclusion in personal development plan	Lead trainer will run the discussion
11.00	Break			
11.15	Working on a clear direction: Goal setting and prioritising	Understanding the role and priorities as a manager	Starting with Story of Large Rocks (Steven Covey) Participants create an overview of their tasks and responsibilities as a manager and learn how to make a distinction between 'urgent' and 'important', using Covey's Matrix Post-its	Plenary story telling Lead Trainer In small groups, trainers walk around and help

CHAPTER 5

Creating training materials

In this chapter you will find tips and tricks on how to create effective and appealing power point slides, flip charts, how to use the training method of role play and, furthermore, we give you some general tips on how to create meaningful interaction.

Tips and tricks of using Flip Charts

√   Title every flip chart
√   Keep it simple, one topic – one sheet
√   Write in capitals, easy to read
√   Use the colour black and blue for your main lessons
      and coloured markers only to highlight information
√   Face the audience, don't look at the flip chart board
√   Have two flip charts (one for your key lessons,
      one for the participants input, position them well)
√   Start with a blank sheet
√   Write and draw sheets in advance (however do leave
      free pages in between in case you want to change
      or add to a lesson)
√   Stick completed sheets to the wall to keep the main
      lessons visable / as an overview

Tips and tricks of using a Power Point

√   Keep it simple and short (6-8 slides, max 6 words each slide)
√   Use pictures & graphs to enhance learning
√   Face the audience, don't read from the screen
√   Be in-line with your slide

Tips and tricks of how to set up role-plays

What's specific about using the working method: Role-play?

√   The trainer takes the intial lead, participants then follow

√   Role-plays are used at:

          - Insight level: "show me your way"

          - Skill level: to try out the new model/ theory

Learning objectives at insight level; the trainer uses role-play to illustrate a model or explain techniques to the group as a whole.

Learning objectives at skill level; participants know and understand a model and will now practise in smaller groups.

√   Role-play is a form of simulation and should provide a real life example for the participants

√   Role of trainer: directing, coordinating, supporting, potentially acting, debriefing

Be aware: this training method is powerful and unfortunately is often misused by trainers.

Many people have had bad experiences with role-plays, because they received unexpected, confrontational feedback, were seated too long in front of the group or had other uncomfortable situations, for instance with actors. Read the following guidelines to ensure you use role-play effectively in your training.

Before the role-play:

√   Be enthusiastic and sell the exercise

√   Explain the goal and what's in it for the participant

√   Explain the setting: Bring it to life. "Imagine you are working.... in a short while you will meet... or a customer will enter ...."

          Avoid the word "role-play", use the word "exercise" or "real life example".

          Be specific, for example:

          Manager John has a meeting with Kate. Kate is a new employee and he needs to instruct her on a few new tasks. Make characters come to life, and try to make it interesting, a bit juicy...

√   Explain how the preparation will go: what to prepare, with whom and how much time. Make sure as many people as possible in the group prepare for their part in the role-play.

√   Explain how the role play is going to be carried out: how often, how long, with or without video, and where.

Just before you start the role-play:
√   Prepare the setting, and if needed, set the camera
√   Give last instructions
√   Make sure you instruct observers one last time, instruct them to take notes/ observe behaviour closely linked to the learning objective. Keep the learning objective on a flip chart in sight.

During the role-play:
√   As many people as possible are practising
√   Make sure the role-play does not last longer than 7 minutes
√   Make sure you reward and give compliments
√   Make notes on the behaviour related to the learning objective. Write down examples and literal quotes so you can have a good and concise debrief.

Steps for debriefing a role-play:
√   As a trainer make sure you clearly take the lead during the debrief
√   You change the setting and help participants to snap out of the role-play, by changing position
√   You sit in front of the group and take charge
√   You always allow the people who have performed in the role-play to first respond on their own performance
√   You will then repeat the learning objective and asks observers to give their feedback
√   You will add your feedback as a trainer. Make sure you only give feedback concerning behaviour related to the learning objective; on **insights level** you will only give general comments since the participants have not yet received the theory, and on **skill level** you can debrief very concisely on the given content.
√   You wrap up with a clear conclusion and a thank you to the participants who were performing in the role-play

General tips on meaningful interaction

√   Formulate key questions for each one of your learning objectives
Training is an activity with a clear purpose. During the training you always have to keep track of the learning objective(s) you are working on. If these are clear to you, only then will you be able to ask those questions needed to get the right type of interaction you are looking for.

√   Use a learning centered approach
Let participants be impressed by themselves instead of overwhelmed by you as the trainer. Enable them to match personal and professional goals, encourage and reward active participation and give participants enough opportunities to take responsibility for their own learning needs.

How?
- Make participants think by letting them discuss and solve problems, and not give the answers right away
- Stimulate critical thinking and encourage questioning
- Provide activities related to real life experiences, make sure participants reflect on these experiences and give each other feedback, only then folllow with your view and theory
- Build on the experience of participants by understanding their needs, values and backgrounds
- Sit down and listen

√   Manage expectations
For people to feel 'safe' and to be open for any learning experience, they need to know what to expect. Managing expectations is important, therefore we advise you throughout the training to point out:
- What they will be doing and why
- For how long
- With whom
- On what criteria
- Exercises they do will be evaluated

In short, continually explain what you are doing and why, and what is going to happen next

CHAPTER 6

Studying the participants

Key questions once you have received your intakes:

√ Is the training covering the learning needs? Is there a clear match between your programme objectives and the learning needs?

√ At what point are you going to use case studies and examples of participants?

√ Which parts are you going to pay extra attention to based on the intakes, and which parts seem less relevant?

CHAPTER 7

Making agreements with your co-trainer

√ Decide who is in the lead – "Owner of the training"

In order to work effectively together, (before, during and after the training) it is highly recommended to appoint who is the leader. Both trainers are equally responsible for the quality of the training, however, try to decide on one 'lead' trainer.

√ Make joint agreements to achieve your mutual goals

Training means multitasking.
Presenting, maintaining the overview of the programme, time keeping, listening, stimulating interaction, observing the energy level of your participants and much more.
Next to this, you need to make sure that both of you have a clear plan to follow. You do not want to be focusing on what your co-trainer may or may not be doing.
Make sure you give yourselves a great experience by being well prepared as a
 team. It is useful to have decided how you want to work together. What roles and tasks each one will take. What works for you?

Before the training	During the training	After the training
Agreement on learning objectives and how you perceive the learning needs of your participants	Be present and on time Help each other set up	Celebrate and relax
Describe roles and prepare a timeline	Use breaks to debrief and support each other	Debrief and evaluate the training with co trainer
Agreements on development and preparation: who will do what? – Training framework – Training plan – Training materials	Clear roles for each part For example, when one presents the other keeps eye on group dynamic and time	Analyse and redesign the training by using your own notes, the participants evaluations and feedback
Make agreement on how to work together during the training: – Agree to not disagree in front of the group – Agree on ground rules – Agree on when and how to give each other feedback Make agreements in advance on when and how to evaluate the training	Establish codes to help each other Monitor and make notes of what goes well and what can be improved. The co-trainer can do this when not presenting.	Give feedback to the client and follow up on promises made to the group by providing themwith course materials, participant's postcards with learning goals, etc.

CHAPTER 8

Evaluating and reviewing the training plan

After you have delivered the course once, evaluate with your co-trainer and review the training plan based on your experiences on what worked and what didn't.
It is wise to keep a report during your (first) training delivery so you can capture useful questions and remarks and also keep a realistic timeline.