

The Occasional Trainer: What You Must Know to Help Others Learn

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“Maria, you’re one of the best salespeople in this whole department. We’re bringing on more new hires to keep up with increased business. We’re also making you an on-the-job trainer. You’ll be assigned new hires. Show them the ropes. Teach them the job and our systems. Get them up to speed as fast as possible...”

“To speed up the internal audit process, we are asking you, as experienced internal auditors, to go out to the branches and help them prepare for audits. You have the expertise. You also know what the branches can do to reduce time and errors in an audit. For the next three months, you’ll all be helping out to train branch personnel.”

“Jean, I don’t know how to attach the cables and calibrate the new unit for running pressure tests. Can you help me figure it out? I’m expected these going forward.”

“Now that you’ve been promoted to team lead, you’ll be expected to monitor how each of your team members perform as they rotate through each station. In addition to your regular duties, you’ll have to train them on operations, daily maintenance, sanitation, customer service, display case stocking...”

These scenarios and others just like them occur daily somewhere in the workplace. Know how to do something well? Perform well? Sooner or later, you will be pegged to help others out. You may be “a doctor, a lawyer, a beggar or a thief,” but being good at what you do almost inevitably leads to having you “show” someone else how to do it. Translation: “Show” equals “train.”

In fact, this is the most common way trainers are selected in the workplace. Superior performance is often a signal for assigning training responsibilities to an individual. Frequently, the training assignment is in addition to carrying out regular job duties.

Are you equipped to take on the training role? The purpose of this chapter is to have you respond to this question with an enthusiastic “yes.” It is aimed at helping you become as competent an “occasional trainer” as you are a recognized high performer in your present work role. By the end of the chapter, you will be able to train “newbies,” whom we define as anyone who has not yet acquired the skills and knowledge to perform in a given job, so that they will be able to demonstrate desired performance to your, their and other stakeholders’ standards.

Occasional Trainer: What Is It?

Let's begin your journey as an occasional trainer with some basic vocabulary terms. These are useful to help you build up in your mind what it means to be an occasional trainer and why, to be successful, you will have to restructure a lot of your current doing and thinking.

- *Occasional trainer (OT)*: This is someone who, from time to time, finds himself/herself in the role of teacher/trainer. OTs do not usually start out seeking to become trainers as part of their careers. Often, because of work experience, practice, trial and error, but most importantly, successful on-job performance, the call goes out to someone like you. You know how to do something well. You are recognized for your competence. It is only a small, natural step to ask you to help others learn a piece or all of the competency repertoire you have acquired. The "occasional" in the term OT means that the teaching role will only be tapped infrequently and rarely on a regular basis.
- *Subject-matter expert (SME)*: This refers to someone who has mastered some area of expertise. It is a tricky, but extremely important term. Tricky because there is a huge distinction between knowing and doing. True SMEs are those who can successfully perform on the job at a high level. SMEs can be athletes, plumbers, salespersons, singers, scientists, software programmers or restaurant servers. How they do their jobs and the results of their performance are judged to be of high quality.

There is a problem with SMEs, however. Most expert "doers" – ones that are truly competent in their jobs – are generally not able to explain *exactly* what it is they do to be successful. We refer to this as "unconscious competence." Some so-called SMEs, on the other hand, appear to *know* a lot and can speak intelligently about a topic or a task. Unfortunately, this does not necessarily mean that they can "do" it really well. The best OTs are SMEs who can perform (do) the task or job well and can also provide meaningful explanations about the why and how of what they do. It is absolutely essential for you to understand and hold in your heart the difference between knowing and doing. They are not the same. Talk is insufficient and often confusing when it comes to helping people perform. SMEs who can make the transition to ideal OTs are ones who can correctly guide the performance of novices. As we continue along in this chapter, this will soon be you.

- *Tutor, teacher, trainer, instructor, educator, coach, helpful colleague*: All have one common goal – to bring someone who lacks the capability (the required knowledge and skills) to perform to the point where they are able to achieve success. All of those named above are, to some degree, OTs. The key difference between them and you is that *you* have been deliberately selected

for the role based on your track record, to fulfill the OT role in a very specific way.

- *Learner (aka student, trainee, apprentice, new hire, lost soul)*: Last, but absolutely far from least (in fact, foremost), is the target of the OT's efforts – the learner. This is the person whom you have been tasked with the job of transforming. Your success as an OT is judged by one major measure – how well your learner or learners perform based your instruction. Going back to the opening scenarios of this chapter:
 - Maria's success will be judged by how quickly and how much the new hires sell, as well as how successfully they do their jobs using the store's systems.
 - The internal auditor OTs will be measured by the speed, efficiency, accuracy and completion of branch audit preparations and, ultimately, improvement in the branch audit process.
 - Jean will be deemed successful as an OT if his young colleague is able to independently attach cables properly and calibrate the new unit so that his pressure tests run error free and according to technical standards.
 - The team lead will be judged as a success if her team members perform according to company standards at each station.

The learner is the central focus of the OT. It is not how well you, as an OT, can *transmit* information to the learner. It is the measured degree to which the learner has been *transformed* by you that is the ultimate criterion of his/her and your success.

Now For Some Learning Theory To Help Develop Your OT Mindset

Let's begin with some key concepts. If someone talks, do you necessarily learn? Perhaps sometimes and some bits, but it is unlikely that you will get all of it, right? So, what follows are a few key "theoretical" points about learning (Note: Theory is, very simply, an explanation of how things work – of cause and effect. There is sufficient evidence to support the explanation, although it may require more testing to establish its full legitimacy.)

1. **The more learners do – that is meaningful to them – the more they learn and the better they feel about it.** The three key words here are "learners," "do" and "meaningful." Remember, it's all about the learner. SME OTs tend to do a lot of doing and saying in their training roles rather than allowing the learners to become actively engaged right from the start. SME OTs also tend to use terms and provide explanations learners do not fully understand. If

what the OT says is not meaningful to the learner, not much gets through. Having learners “do” early in the game and then shaping their behaviors as they try out things for themselves not only builds learning and performance more rapidly, it allows them to experience their own progress. They feel good about their successes.

2. If learners feel competent and confident about the skills and knowledge they are acquiring, they will be more likely to use them in the real world.

This is self-explanatory. You do; you get feedback; you try again; you improve; you sense progress and experience valued accomplishments. The result: You feel more capable of performing and your desire to apply what you have learned back on the job increases.

3. Learning occurs most rapidly when instruction is organized according to the logic of the learner, not the content, and is focused on performance.

SMEs acquire their expertise over time, through trial and error and by doing, not talking about what is to be done. Most of the time, SMEs acquire their skills and knowledge unsystematically. Events occur. They respond. They try things out. Eventually, they figure out/experience what works and what does not. The learning time is long.

Under your care as an OT, your learners are not given that long a timeline to try out, experience and assimilate. Your job is to take your learners from where they are to where they should be within a short time frame. This means that you have to think like your learners, not like an expert. You have three critical responsibilities:

- To organize, from the chaos of your experience, activities that break down the task at hand into simple, logical steps that walk the learners from their starting points to where they eventually attain the targeted performance goal.
- To base all of your activities and explanations on how a *novice* thinks. You proceed based on learner rather than content logic. What you teach only makes sense if the learner is able to attach the new learning you provide with prior knowledge and experience.
- To focus on the doing, only bringing in explanations, terminology and background content that reinforces learner actions. The rule is: Focus on the performance; do not dwell on the details.

4. Experts process information differently than novices. You ask a local for directions on how to get from Point A to Point B. Response: “Well, let’s see. You can go about a mile, or maybe closer to two miles along Oak Street. Well, actually, it used to be Steamboat Street, but the city council decided to use tree names – you know, eco-friendly – but that’s another story – until you

come to Phillips Tower. You'll recognize it because it's the only building in town with a weather vane on the top. Then, turn east until..." Soon, you are lost and confused by the explanation. A final, "There's a shorter way, of course, if you just..." followed by, "Either way, you can't miss it." That is when you know that you are doomed.

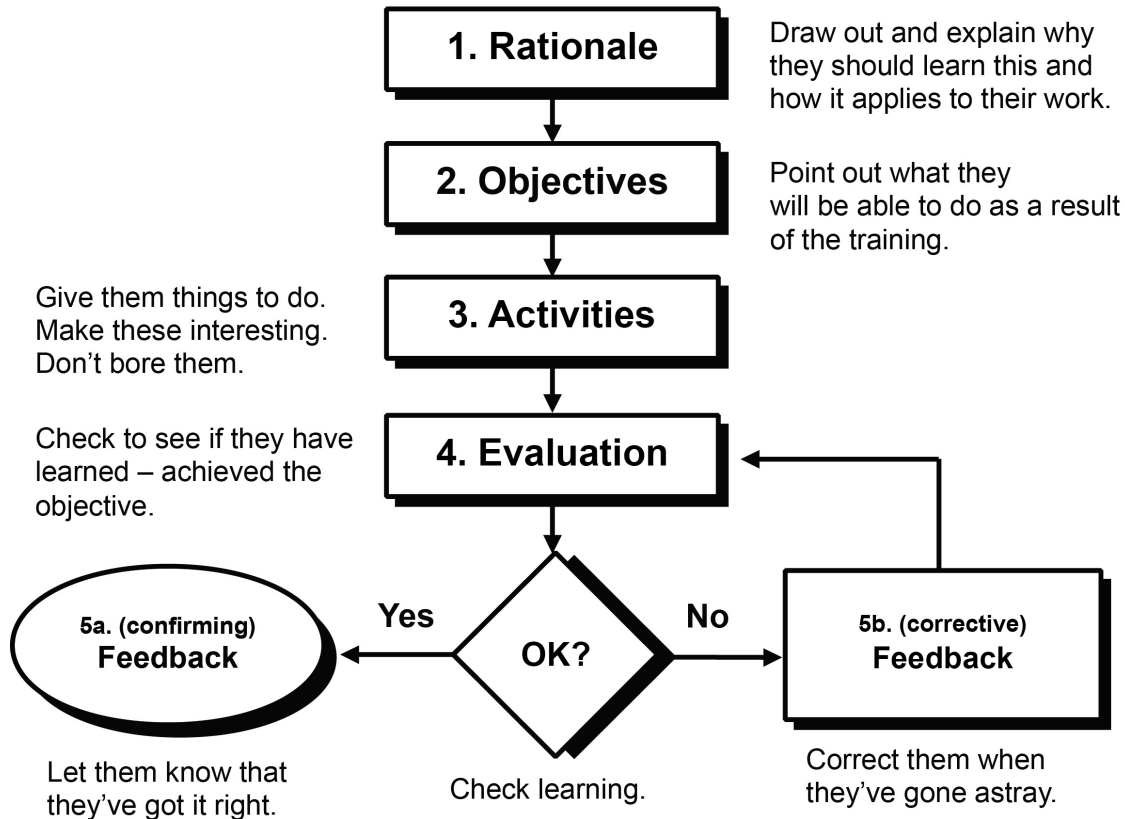
Ask someone who only arrived in town the previous day and traversed from Point A to Point B a single time. More than likely, the explanation this newcomer gives will resemble this: "Go straight 15 blocks to Plum Street. Turn right and go five blocks until you see the McDonald's on your right. Turn left at the first corner just past McDonald's onto Orchard Street. Point B is on the left about 10 buildings up." Makes a lot more sense.

As an OT, drop your SME persona. Become a learner with minimal specialized reference points or terms. Assume a more general background and adopt the same fear of the unknown as your learners are experiencing. A frequent admonishment we give to OTs is: "Don't be a sage on the stage. Be a guide on the side." Be the support an anxious, untried, inexperienced learner requires.

A Universal Model for Structuring Training

Wouldn't it be wonderful if you had a simple, easy-to-use formula you could apply to any training situation, type and number of learners, content and difficulty level and feel confident of achieving a high probability of success with your learners? The good news is that such a formula exists. We call it the *5-Step Model for Training*. Let's examine it and then observe it in use. Figure 1 shows the model itself.

Figure 1. 5-Step Model for Structuring Training



Now for explanation:

Rationale: Learners, especially adult learners, face a large number of competing priorities, all clamoring for attention. As an OT, you have to cut to the head of the line. You can best do this and grab their attention by providing a sound, *meaningful* reason (rationale) for focusing on what they will gain from their interaction with you. The more you engage your learner/s in building the rationale, the more readily they will open their minds to you and learn.

Objectives: Give your learners a meaningful target to attain. It must be observable, achievable and produce a valued end result. Here are several examples. Note that they always begin with “You will be able to...”

- Complete the inspection report of the A3 engine, with every point checked off and annotated as required by the Safety Regulations Manual, p. 47.
- Discriminate between a flammable and an explosive material with 100 percent accuracy.
- Organize an office environment for a hiring interview so that it conforms to best practice standards in our HR Guidelines Manual.

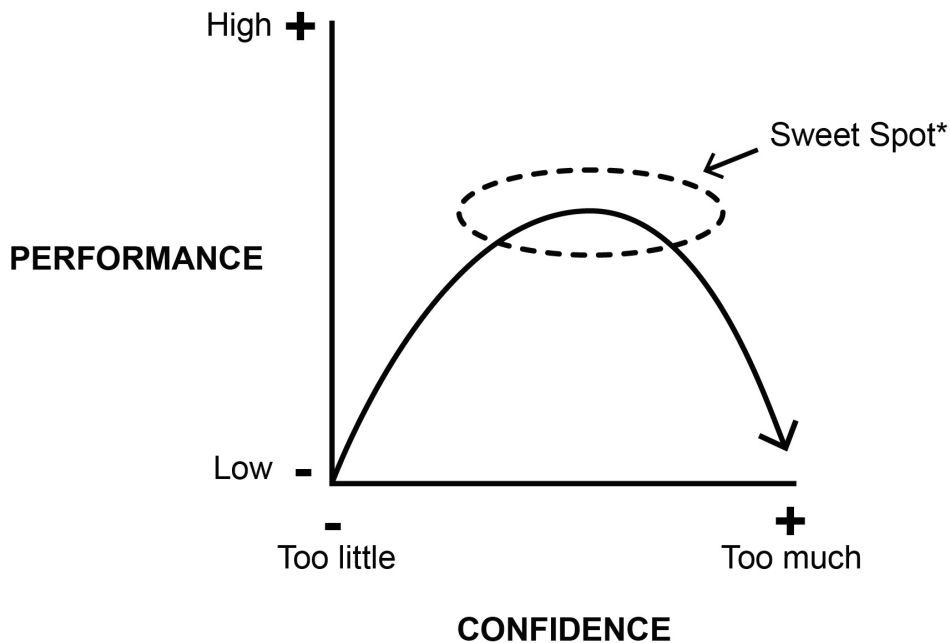
- Adjust the ergonomic bus driver seat so that it conforms to your body at each of the seven key pressure points.
- Produce a proposal that contains all the information required by a given RFP, is fully accurate and considered convincing by your supervisor or trainer.

Notice that in every case, the burden is on the learner to demonstrate performance – “*You* will be able to...” Nowhere do the words: “I will show you...” “We will talk about...” or even, “You will learn...” appear in the objective. You, as an OT, cut to the chase. You establish the contract. If the learners participate and engage in the session, they will be able to demonstrate real performance at a defined standard.

Activities: Now you embark upon a series of instructional events that lead the learners from their current state of performance capability to the point at which they can demonstrate objective/s accomplishment. The activities must be mentally engaging, meaningful (there we go again) and get the learners to demonstrate progress. There should be just enough challenge to motivate them to want to succeed and enough support that they do not feel threatened.

Please bear in mind that each learner is unique. She or he may require more or less challenge or encouragement/support and practice based on the confidence each feels. Strike a balance between engendering under- and overconfidence (see Figure 2).

Figure 2. Relationship Between Confidence and Performance



*Too much confidence tends to generate more errors than too little confidence.

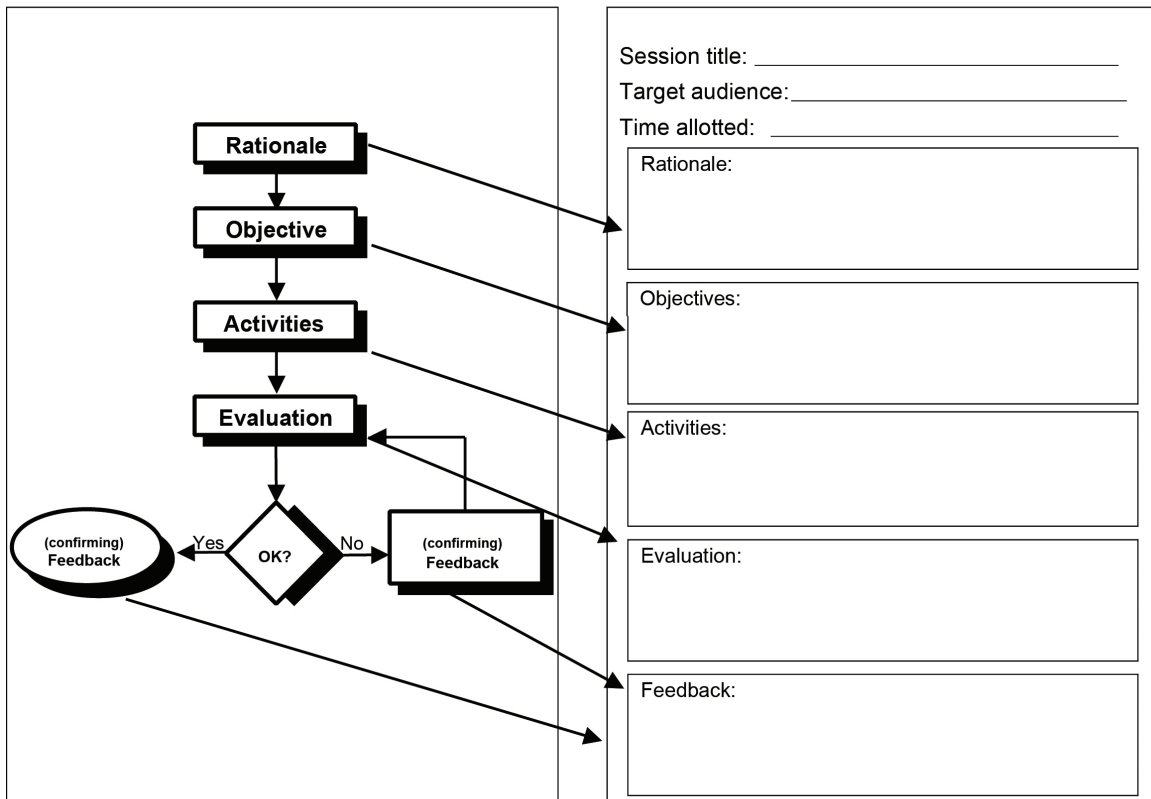
Evaluation: Along the way you, as an OT, continually encourage the learners to do things as they progress toward complete objective attainment. At each step of the way you verify how well they perform. Continuous and final verification of performance with feedback is essential for helping learners meet the objective/s.

Feedback: Based on how each learner performs, you provide feedback, either *corrective* – to help the learner change behaviors – or *confirming* – to acknowledge that they have “got it.” Important rule: You must always focus your feedback on the learner’s performance and never on the person.

How Does This Work Out in Real Life?

Examine Figure 3: From Model to Training Plan.

Figure 3. From Model to Training Plan



The 5-Step Model easily transforms itself from figure to worksheet. In planning your training, one-on-one or one-on-many, you select a straightforward title that encapsulates the lesson, name your learner (or learner group) by title or other meaningful descriptor and then use bullet points to outline what you and your learners will be doing. You can add details as needed, but often, key points are sufficient. Bear in mind two absolutely essential rules:

- Every time you train, your session must be *learner-centered* and *performance-based*. Translation: It is all about the learners and their characteristics and capabilities. At every step of the way, the learners must be actively engaged and demonstrating performance. The opposite of learner-centered and performance-based is instructor-centered and content-based. Do not go there! Remember: Your success comes from their success. It is about their transformation, not your transmission.
- The less you do and the more they engage, the greater your success as an OT.

Figure 4 provides an example of a training plan (adapted from Stolovitch and Keeps, 2011, p. 88). Read through it. Imagine that you are conducting this training session. Picture what is happening during the session. Does it come to

life for you? Can you see yourself running such a session, assuming that you possess the necessary subject-matter expertise? (Some background: Once a year the State Fair opens for a month. Each year, organizers have to train off-the-street hires to work various operations of the event. One of the important groups is ticket sellers. What follows in Figure 4 is the training plan the OT assigned to train this new group of 25 part-timers has created. See if it incorporates all the key points we have presented so far in this chapter.)

Figure 4. Training Plan for State Fair Ticket Sellers

Training Plan	
Session title:	<u>Selling tickets, collecting money, and giving change</u>
Target audience:	<u>State fair ticket sellers (15 participants per session)</u>
Allotted time:	<u>Two hours, 30 minutes</u>
Rationale:	
<ul style="list-style-type: none"> • The most important and trickiest part of the job is selling tickets and making correct change. • Despite background noise, if you've got the knack, you won't have problems. • You are responsible for your errors up to \$100. Learn the job right, and you will be error free. • Every day we have a bonus for the quickest and most accurate ticket seller. • Some people get hostile when you are slow or make errors. This session will help you avoid the pain. 	
Objectives:	
<i>Overall objective:</i>	
Participants will be able to sell the exact number and type of tickets, collect the exact amount of money, and give the correct change for any customer without error and at an average time of 20 seconds per transaction (maximum group of eight people per transaction).	
<i>Specific objectives:</i>	
<ul style="list-style-type: none"> • Identify the exact numbers and types of admission tickets the customer requests. • Calculate the exact total cost in 10 seconds with no errors. • Collect the correct total amount with no errors. • Give the customer the exact change with no errors. 	
Activities:	
<ul style="list-style-type: none"> • Draw from participants what concerns them most about their new job. • Show how this session helps decrease or eliminate those concerns. • Present key points of rationale and discuss each one. • Show ticket price / customer job aids and demonstrate use. • Using different voices and admission requests, have participants determine exact request and cost. • After several examples, time the exercise. • Using play money and coins, have participants practice collecting money, issuing tickets, and giving change. This is a peer-pair activity. • In simulated ticket booths, create a practice session putting all parts together. Loudly play audiotape of background noise. 	
Evaluation:	
<ul style="list-style-type: none"> • Practice exercises with timing toward the end for each activity. • Final evaluation: In the simulated ticket booths, each learner services 10 peer customers, each with different characteristics and requirements. An audiotape plays loud background noise. Peers talk. 	

Throughout the session, the OT draws learners into dialogue, building the rationale, clarifying objectives, engaging participation and requiring demonstration of performance and verifying objective attainment.

Is Your Training Plan and Actual Training Session Likely to Produce Results?

Obviously, the proof of the pudding is in the eating. However, there is a way to check that you will achieve a high probability of success with your Training Plan. Figure 5, Training Plan Checklist, helps you test what you intend to do. You can also ask someone you trust, especially if she or he is an experienced trainer, to observe you train as she or he applies this checklist. Any time a “No” is checked off, a revision is necessary. By applying the checklist, you will soon find that your occasional training sessions hit the mark every time.

Figure 5. Training Plan Checklist

Criterion	Yes	No
The rationale is presented in terms of the learner.	<input type="checkbox"/>	<input type="checkbox"/>
The learner participates and contributes in building the rationale.	<input type="checkbox"/>	<input type="checkbox"/>
The objectives are stated in terms of the learner.	<input type="checkbox"/>	<input type="checkbox"/>
The objectives are verifiable.	<input type="checkbox"/>	<input type="checkbox"/>
The objectives are appropriate to the learner and the content.	<input type="checkbox"/>	<input type="checkbox"/>
The activities are appropriate to the objectives (lead the learner to attain the objectives).	<input type="checkbox"/>	<input type="checkbox"/>
The activities require learner participation at least 50% of the time.	<input type="checkbox"/>	<input type="checkbox"/>
Learner can participate and contribute during the activities.	<input type="checkbox"/>	<input type="checkbox"/>
Evaluation is appropriate to the objectives.	<input type="checkbox"/>	<input type="checkbox"/>
Feedback is appropriate.	<input type="checkbox"/>	<input type="checkbox"/>
The session can be conducted within the allotted time.	<input type="checkbox"/>	<input type="checkbox"/>

Tying It All Together

When you get cast in the role of OT, either by accident or design, the most important thing you must hold in your mind and heart is that you are no longer the expert performer...no longer the SME. You are an educator...a drawer-out of performance. Whatever you know is of little value unless it contributes to verifiable, observable learner performance. You are the orchestra conductor. Your success is in how well the musicians play individually and, when needed, together.

The good news about being an OT is that you have the opportunity to help people in ways they and others value. We may not all love school, but we love to show how well we have learned and can perform. There is nothing more rewarding than to see your learners' shining eyes and smiles – because of you.

Resources

Stolovitch, H.D. and Keeps, E.K. (2011). *Telling Ain't Training: Updated, Expanded and Enhanced* (second edition). Alexandria, VA: ASTD Press.

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Goad, T.W. (2010). *The First-Time Trainer: A Step-by-Step Quick Guide for Managers, Supervisors and New Teaching Professionals* (second edition). New York, NY: American Management Association.