

Helping Managers Be Better Trainers

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Many organizations have found it beneficial to use managers and technical experts on their staff as resources for training programs. People in this role are sometimes called “subject matter experts.” If you are asked to be a training program faculty member, it’s probably because you are familiar with the organization and you know the content of the material to be dealt with in the program. However, you may be unfamiliar with the roles and techniques of a presenter or faculty member in a training program. This brief set of guidelines is written to help familiarize you with this role, help you “think like a professional trainer,” and prepare you for successful program leadership. By the way, many of the principles and techniques discussed here will also apply to your practice as managers and supervisors outside of the training classroom as you provide on-the-job coaching and support for optimum employee performance.

Learning Principles

Quality and relevance in training programs can be helped by implementing the most well tested and sound principles of adult learning in the training and development field. These principles may be summed up in the following six phrases:

1. Regard learners as self-directed adults.
2. Develop high mutual trust among learners and faculty.
3. Actively involve learners in the learning process.
4. Respect and use the learner's previous experience.
5. Organize content material so that it addresses the learner's problems and needs.
6. Provide opportunity for immediate application of learning whenever possible.

To help you implement these six principles, I suggest the following guidelines for you to use in preparing for and presenting your training sessions.

Faculty Guidelines

Guideline #1. As you plan your session, consider that only **half** of your allotted time in the program schedule is for your content presentation. The other half is for the learners to use at the beginning, during, and end of the session to assure that real learning -- relevant to the learner's needs -- has occurred.

Too often, a presenter will act as if mere transmission were equated with learning. We all know better from our own experience. Training program faculty must be at least as concerned with what the learners receive as they are with what they have to transmit to them. Inexperienced and threatened or nervous presenters often reflect their anxiety by sprucing up their lecture notes or adding more content ("Just 4 or 5 more slides, mind you...") to be sure they won't run out of material or "die" in front of the group. Often

there is also the fear that they won't "cover all the material." So they try to cram in more and more, sometimes overloading the learner and leaving out the learner's needs entirely. When presenters have learned to trust the learners and plan time for them to be an active part of the learning process, they reduce their own nervousness. They set sound priorities on the content they can expect to deal with intelligently, and make the learning process reasonable and trustable. The result is the learning improves and is more likely to be actually implemented on-the-job.

Guideline # 2. A good way to select from among all of the possible content that you have to offer as a presenter is to imagine that you are in the learner's shoes. Ask yourself, what real-time problems are they most likely to run into that your content could help them handle better? Estimate for every 30 minutes of presentation time you have allotted to you in the schedule, you can only deal with 2 or 3 problems. With this estimate in mind, select the problems you can deal with in your session. Let the problems act as your presentation structure and **arrange your content around the problems**. For example, if I am presenting to managers who have to perform as subject matter experts in a training program, I avoid making a protracted, logical presentation of adult learning psychology. Instead, I try to imagine the problems they might have as presenters and organize my material around those problems. For example, the problems I used for the presentation of this paper are these: 1) the readers will probably have to learn how to estimate what they can include in the time they have; 2) they have to organize their presentation somehow; 3) they have to create a good "opener" that will "hook" the learners into the learning process; 4) they have to build trust and confidence with the learners; 5) they have to keep the learners' attention and make sure the learners really understand and can use the material being discussed.

Try to release yourself from an exclusive reliance on your own "logical order" for the content. The learners don't know the logic of your material, they only know the problems they have to face. Use your logical order when it's relevant, but otherwise let their problems be the pegs on which you hang your content points. They can organize the material into their own logical order later. Right now, they need to see how your material can help them solve their problems.

This process of boiling the content down into a tight time allocation may be the most difficult aspect of being an effective presenter. It's especially hard when you think you "really" have more time allocated to you in the program because the schedule says so. But that is a myth. The time is not allocated to you -- **it is allocated to the learners** for them to become familiar with, informed about and interested in what you have to offer. Since you know much more about the topic than you could possibly "cover" (if you didn't you wouldn't be on the faculty), you have to remember that your major purpose in the session must be to get their attention, help them see the key high-priority points, and leave them wanting more and interested enough to come to you, or others, later and get it. Maintain your focus on **what they need to learn for their performance** in the long run rather than on your own need to present everything you have to offer in the short run.

Having prioritized your content well enough so that you can present it in half the scheduled time, you have preserved the other half to help get the learners actively involved in the learning process. The next guideline suggest some techniques for this.

Guideline #3. At the beginning of your session, provide the learners with a structured opportunity to become clear about the problem(s) which your session, or part of a session, will handle. Here are some examples of brief processes that can be used to stimulate interest just before you start your presentation:

- Print the problems you used to organize your presentation on flip chart sheets, one problem statement per sheet, and post them on the wall. Give each person in the group a felt marker and 5 to 10 minutes to walk around the room and print the specific questions, issues and sub-problems they see as coming under each of the major problem statements. Encourage them to discuss their ideas together as they walk around. Use their input as the basis for illustrations, examples, etc., during your presentation which is structured around the major problems. (If you can't use every last one of the items they listed, it's OK.)
- Give the learners a brief typical situation, either in writing or verbally, that is related to your topic. Ask them to identify questions or problems they see as relevant to handling this situation. Record the questions on a flip chart, post them on the wall, and be sure to address them as you go through your presentation.
- Another involving opener is to divide the group into small discussion groups. Ask the groups to come up with 3 to 5 questions, issues, or problems that they regard as related to your topic. Record their responses, one from each sub-group, until all of the ideas are up on flip charts. Refer to them throughout your session.

Special note when using a flip chart to facilitate discussion: While you are recording the points the learners are making onto flip charts, maintain steady eye contact with those doing the reporting-out, give them plenty of verbal and non-verbal feedback that shows they have your full attention and interest, and check-out with them that you have written their ideas accurately on the flip chart each time a different point is made. This process, deceptively simple, helps to establish a relationship of mutual respect and trust that sets a climate highly conducive to learning and change. Not only does the one doing the talking know you are listening to them, so does everyone else in the room who is watching. As important as it is, however, this trust building process sometimes gets forgotten because "listening to them takes time away from what I have to present." But we already dealt with that issue in Guideline #2. You can always get back to them later if you find you have more content to transmit, but you can only establish and develop that all-important trusting relationship right NOW! So, take the extra minute or two and listen. As just another person in the room, it may not seem important to "just listen." But you are not "just another person in the room." You are a member of the program faculty. Your listening to them carries a powerful implicit message. It

says they are important enough for you to listen to them -- carefully. People who feel important, respected, and more secure, learn better and faster.

These procedures, or variations of them that you invent, will help get the learner's attention focused on your topic, give them a chance to be actively involved, and help them to relate your topic to questions and problems experienced in their own lives. And it takes only a few minutes. Once they have asked their questions and made their input, you now can serve in the role of a resource person who is providing answers to real questions. (There is an axiom: "Nothing is less relevant than the answer to a question that hasn't been asked!") By first helping them to ask and being a listener to them, you also set an instructional example for active listening in the learning session -- something you want them to do now that your presentation is about to begin.

Guideline #4. Make your presentation as totally enthralling, dramatic, exciting, and attention-getting as good taste and your own tolerance for embarrassment can stand. Take a lesson from Disney and remember that good learning and entertainment go hand-in-hand. Use charts and graphics whenever you can to illustrate complex relationships or concepts. A colleague once wisely advised that, if I couldn't chart out a complicated idea in graphic form, I probably didn't understand it myself well enough to be presenting it to someone else. The thought, and the truth of it, has humbled me many times since. Nonetheless, communicate! Use every device you can think of to help you make your points: power-point slides, posters, colors and graphics, clear and simple overhead slides, flip charts, films and video tapes, dramatic reading, pithy quotes, etc., etc., etc. Some rules-of-thumb about A-V support are these: use only that which reinforces the program points; never use technology to dazzle, impress the audience, or just fill up time; whatever you use, be sure you know how to use it flawlessly and prepare well enough so that the technology doesn't interrupt the learning process (computers that fail, burned-out bulbs, videos that are not cued-up, fumbling with light switches, etc.). Most important of all, **be enthusiastic** about your subject. Be funny, but always with a point. Tell stories and give examples from your own experience. (Avoid stories that are at the expense of a race, gender, nationality, or other group unless the issue being illustrated by the story makes it directly relevant.) Whenever possible, support your presentation with handouts and other relevant printed materials that they can take with them and refer to later when they need it. The learning process, after all, goes on and on. It's only your *session* that ends when time runs out.

Guideline #5. Remember, in Guideline #1 you allocated half of the scheduled session to your presentation and half to processes that would involve the learner. Part of the time you set aside for them was used to get them asking their questions and identifying their problems or sub-problems. That process set up your presentation. At this point in your session you should have plenty of time for getting the learners actively involved in a process that discusses, tests, implements, or actually uses the material you just presented. There are lots of ways to get them involved. Use your imagination and see what you can come up with. Here are a few techniques that have been successful in a variety of learning settings:

- Distribute work-sheets on which the material you just covered can be applied. Structure an exercise in which the learner plans for or actually implements points you just made in the presentation. Monitor their progress, take questions as they come up, and offer clarifications as they encounter difficulties in the application exercise.
- Give out a typed case example to which they can apply ideas you just presented. Ask them to analyze it and apply your ideas in an appropriate fashion either individually or in sub-groups. Moderate a discussion after they have had time to read and analyze the case.
- Ask the more seasoned participants to share case examples from their own experience concerning the key points in your presentation.

If you haven't prepared anything in advance and have only 10 or 15 minutes left after your presentation, try this:

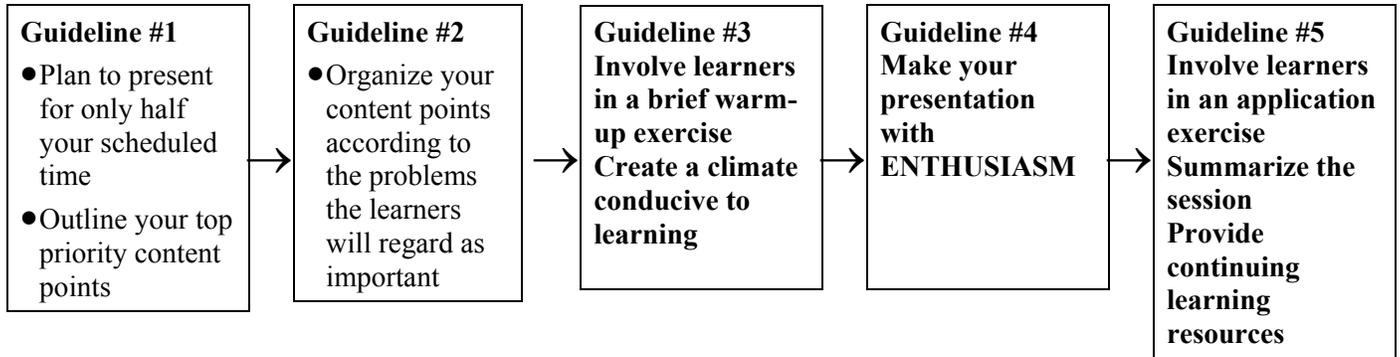
Divide them into groups of 4 or 5 and ask them to discuss, for just 2 or 3 minutes, what they just heard you say in your presentation. Ask them to identify any questions or points they want to hear more about or examples that they have to offer. At the appropriate time, give them a "one more minute" warning. After the 2 or 3 minutes you allocated is over, tell them that time is up and wait until they stop their discussion. Ask each group in turn to share one question or example and respond to it. Continue taking one item from each group and commenting on it until time in the session nearly runs out. Summarize, and leave them wanting more.

SUMMARY

Much more could be said. However, these are only guidelines, not a textbook. But, you get the main ideas. Use "your time" to give them space, too. Trust them. Look at them. Listen intensively. Go "uh-huh" a lot and smile while they are talking. Focus on **their** problems. Be sure to get their questions and give them a chance to share and build on their experiences. Help them apply what you are teaching to their own life situations. Figure out how you can get them into discussing key issues and teaching each other.

Part of your role, a critical part, is being a content expert. Another part, one that is often less familiar, is your role as an example (role-model) and facilitator of their learning process. Their learning occurs better and faster, and will endure longer, when they are helped to be active rather than passive as learners. Their learning is maximized when they are actually experiencing the key points you are trying to teach. As McLuhan once said: "It is experience, rather than understanding, that determines behavior."

And now, here is my attempt at a flow chart of what this paper is trying to say.



Good luck in your role as subject matter expert and trainer. Your careful preparation and continuing focus on the learners’ needs will help assure your smashing success. Keep in mind when it’s all over that it is only the session that ends. The learning process that you have begun with them goes on and on. Behind it all is the supra-value of creating active, participating, self-directing learners who can continue to initiate and guide their own learning process back on the job and throughout their lives.