

» **Fourth** Edition

25th
Anniversary

» *Active* » **Training**

A Handbook of Techniques,
Designs, Case Examples, and Tips

Mel Silberman &
Elaine Biech

WILEY

Active **Training**

Fourth Edition

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Designs, Case Examples, and Tips

Mel Silberman &
Elaine Biech

Assisted by Carol Auerbach

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Contents

Acknowledgments / xi
Preface / xiii
The Goals of This Book / xiv
How This Book Is Organized / xv

PART ONE INTRODUCING ACTIVE TRAINING / 1

The Nature of Adult Learning / 2
The Social Side of Learning / 6
Concerns About Active Training / 7
The Delivery of Active Training / 10

PART TWO DESIGNING AN ACTIVE TRAINING PROGRAM / 13

Steps for Designing Active Training / 15
What's in the Part Two Chapters? / 17

Chapter One Assessing Training Needs / 19

Why Do Assessment? / 20
What Information Should Be Collected? / 23
How Can Information Be Collected? / 29
What If There Is No Time to Do a Proper Assessment? / 38

Chapter Two Developing Active Training Objectives / 41

Setting Learning Goals / 42
Selecting Objectives / 44

Specifying Objectives / 47
Expressing Objectives / 48
Communicating Training Objectives to Others / 49

Chapter Three Creating Opening Exercises / 53

What Opening Exercises Accomplish / 53
What to Keep in Mind When Creating Opening Exercises / 67
Ten Ways to Open an Active Online Virtual Training Session / 68
Ten Ways to Obtain Participation / 69

Chapter Four Preparing Brain-Friendly Presentations / 75

Five Ways to Gain Your Audience's Interest / 75
Five Ways to Maximize Understanding and Retention / 82
Five Ways to Involve Participants During a Presentation / 88
Five Ways to Reinforce Presentations / 94
An Example of a Well-Designed Presentation / 99

Chapter Five Finding Alternative Methods to Presenting / 103

Demonstration / 103
Case Study / 105
Guided Teaching / 109
Group Inquiry / 110
Information Search / 113
Study Group / 115
Jigsaw Learning / 118
Learning Tournament / 121
Applying the Alternatives to a Common Topic / 123

Chapter Six Using Experiential Learning Approaches / 129

Role Playing / 130
Games and Simulations / 139
Observation / 144
Mental Imagery / 148
Writing Tasks / 152
Action Learning / 155

Chapter Seven Designing Active Training Activities / 165

The Three Major Ingredients of Any Design / 165
Basic Questions About Any Design / 169
The Remaining Details / 170
Three Tips for Creative Designs / 172

Chapter Eight Sequencing Active Training Activities / 177

Basic Sequencing Guidelines / 178
Applying Sequencing Guidelines / 181
The Finer Side of Sequencing / 188
Experiential Learning Sequences / 193

Chapter Nine Planning Active Training Programs / 199

The Macrodesign of an Active Training Program / 199

Chapter Ten Incorporating Active Learning in All Training / 207

Asynchronous E-Learning / 208
Group-Based E-Learning / 212
Virtual Classrooms / 216
Blended Learning / 218
Social Media Expands Active Training and Development / 220
M-Learning Offers Instant Options / 223

PART THREE CONDUCTING AN ACTIVE TRAINING PROGRAM / 229**Chapter Eleven Beginning an Active Training Program / 233**

Preparing Yourself Mentally / 233
Arranging the Physical Environment / 236
Greeting Participants and Establishing Rapport / 242
Getting the Best from the First Thirty Minutes of Training / 245
Reviewing the Agenda / 246
Inviting Feedback to the Agenda / 248

Chapter Twelve Gaining Leadership of the Group / 253

Setting Group Norms / 253
Controlling Timing and Pacing / 255
Increasing Receptivity to Your Leadership / 257
Handling Problem Situations / 258

Chapter Thirteen Giving Presentations and Leading Discussions / 267

Knowing Your Group / 267
Organizing Your Presentation / 271
Watching Your Body Language / 273
Adding Visuals / 275
Making Smooth Transitions / 277
Facilitating a Lively Discussion / 279

Chapter Fourteen Facilitating Structured Activities and Promoting Team Learning / 287

Structured Activities / 287

Team Learning / 298

Chapter Fifteen Concluding an Active Training Program / 307

Reviewing Program Content / 307

Obtaining Final Questions and Concerns / 309

Promoting Self-Assessment / 312

Focusing on Back-on-the-Job Application / 315

Expressing Final Sentiments / 316

PART FOUR EXTENDING THE VALUE OF AN ACTIVE TRAINING PROGRAM / 319

Chapter Sixteen Providing for Back-on-the-Job Application / 321

Prior to the Training Program / 321

During the Training Program / 323

At the End of the Training Program / 324

Obstacle Assessment / 328

Peer Consultation / 329

Self-Monitoring / 330

Follow-Up Coaching and Support / 340

Chapter Seventeen Evaluating an Active Training Program / 343

Expanding the Four Evaluation Levels / 344

Designing Evaluations / 354

Obtain Feedback Along the Way / 355

PART FIVE THE EVOLVING ROLE OF TRAINERS / 359

Chapter Eighteen Expanded Roles for Trainers / 361

Onboarding / 362

Leading Change / 364

Coaching Managers / 367

Mentoring Programs / 368

Internal Consulting / 371

Building Teams / 373

Chapter Nineteen New Business Realities for Trainers / 379

Doing More with Less / 380

Globalization / 382

Working with Multigenerational Workforces / 384

Working with the C-Suite / 386

Vendor Management / 388

Working with Subject Matter Experts / 390

We've Reached the End—Or Is It the Beginning? / 391

References / 395

About the Authors / 399

Index / 401



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Preface

..... **T**his fourth edition is built on the same solid foundation of active training originated by Mel Silberman. It's been an honor to be asked to revive the active learning work that Mel started. My goal is to continue to acknowledge his work throughout the book by respecting his voice, celebrating and expanding his ideas, and engaging others to pay tribute to Mel.

One of Mel's personal guidelines was, "It's not what you give them; it's what they take away that counts." Mel believed that it didn't matter how much information you disseminated. If the learner was unable to retain it, learning had not occurred. I followed Mel's advice as I edited this book. I tried to revise and add things that would make the content something you can take away.

Mel and I started in this field at about the same time, and although Mel coined the term "Active Training," both of us believed, practiced, and expounded identical philosophies throughout our careers. For a few years before I was solidly grounded in the history of learning and development, and before I'd heard of Malcolm Knowles, I thought I'd invented Adult Learning Theory. Mel and I had a good laugh about that when I first met him.

It's been twenty-five years since Mel's first edition of *Active Training: A Handbook of Techniques, Designs, Case Examples, and Tips* made its way onto our bookshelves. So it is fitting that 2015 has been selected for the fourth edition.

**THE GOALS
OF THIS
BOOK**

Mel's staunch advocates still follow his active learning concepts. Many are represented throughout this and his *101 Ways to Make Training Active* books. Mel's unwavering support is based on the fact that his concepts work. Training is "active" when the learners do most of the work. Learners consider the content, solve problems, make decisions, and practice the skills. This ensures that they are ready to apply what they learned once they return to the workplace or wherever they intend to use their newly acquired skills and knowledge. Like its predecessors, this fourth edition of *Active Training* has three goals:

1. To explore all aspects of training

Training has a front, a middle, and an end. The front involves all the activities involved before the first slide or exercise is ever developed. Foremost are the assessment of the training need and the establishment of training objectives. The middle contains the detailed planning and delivery of the training program. The end focuses on the events that encourage back-on-the-job application, ongoing performance support, and the evaluation of training outcomes. This edition of *Active Training* provides a comprehensive examination of these three phases of training.

2. To promote an active approach to training

The active approach to training involves a commitment to *learning by doing*. Everything we know about adult learners suggests that participants must be actively engaged during a training program for results to occur. If there is little activity, participants will forget or fail to apply what they are taught and will be bored by the material presented. This new edition of *Active Training* continues to define what is meant by the active approach to training and how it can be practiced effectively. It goes beyond the classroom and presents active learning ideas for virtual online classes, using social media, m-learning, and other exciting processes available to our profession.

3. To provide a practical handbook of techniques, designs, case examples, and tips

As *Active Training* promotes learning by doing, it shows how to acquire these skills through *learning by example*. It not only describes several active training techniques but also illustrates how they are applied in actual training situations. Designs and case examples drawn from private and public sector training professionals are presented to give readers ideas for their own situation. One of the special features

of *Active Training* is the wide variety of training topics from which its examples are pulled. All of the examples are flexible enough to be customized to the topics and groups any reader might be training.

Since 1990, the year the first edition was published, much has happened. Training continues to be delivered in classroom settings but now is also delivered in new ways that were only a vision in 1990. The view of training as something that only occurs in classrooms has been broadened to include the concept that training means supporting learning wherever it occurs in the organization—in meetings, on computer screens, through mentors, during work team projects, or on your smartphone.

Many examples of training activities and designs are incorporated in this fourth edition. You will find case examples from a long list of training topics in *Active Training*. They include topics such as career development, change management, childcare, coaching, communication skills, conflict management, cultural diversity, customer service, leadership development, problem solving, project management, sales, succession planning, team building, train-the-trainer, and others. They also come from a variety of industries including banking, government, health care, insurance, manufacturing, real estate, and others.

**HOW THIS
BOOK IS
ORGANIZED**

This book is organized into five parts: starting at the beginning with understanding more about active training and ending with new roles and realities for trainers.

Part One defines and contains a rationale for an active approach to training. It has been updated to reflect the latest theory, research, and practice. Among other things, it examines the case for active training. It contains a discussion of the nature of adult learning, exploring the reasons why adults learn best when they are active in the learning process. It also identifies the frequently asked questions people concerned with the introduction of active training techniques most often ask. Finally, it examines the contexts in which active training is delivered. While most training takes place in classroom-type settings, an active approach to training can be incorporated online, on the job, or in other delivery modes.

Part Two considers all the steps needed, from the opening to the closing elements, to create an instructional design for an active training program, course, workshop, virtual classroom, or session. You will find these names interchangeable throughout the book. You may find yourself needing to just tweak a course a bit or you may be in complete control over a course design. It is in this situation, when

trying to make multiple design decisions that make up a professional training program, that the many tips, designs, and case examples described become especially useful. You will find examples for online learning sprinkled throughout the entire book, but may notice them here more than ever. Chapter 10, “Incorporating Active Training in All Learning,” has been revamped and includes additional discussion about online learning and an expanded discussion of social media and m-learning.

Part Three covers every aspect of training delivery, including climate setting, enlisting participation, managing participant behavior, and staging experiential activities. This fourth edition of *Active Training* emphasizes what you can do to create an experience for your participants. You will find new examples and templates throughout.

Part Four examines how to extend the value of training through follow-up activities and evaluation. You will find both of these chapters expanded. The follow-up activities tap into the expanded Kirkpatrick model to include return on expectation (ROE) as a measurement tool.

Part Five is an entirely new section. It presents two chapters. “The Expanded Roles for Trainers” looks at how you can use Active Training methods in your onboarding programs, when you are called upon to lead change, when and why you coach managers, and several other roles. A second all-new chapter, “New Business Realities for Trainers,” provides ideas when your job calls on you to do more with less, participate in globalization or vendor management, work with a multigenerational workforce, and other new focuses.

If you are new to the training environment or a student studying the field for the first time, reading *Active Training* can help you to learn the reasons why trainers make the design and delivery choices they do when creating an active training program. In addition, you will learn a variety of facilitation techniques that can help you to conduct any training program professionally. The examples help you to make sense out of the components of a good active training program in a way that straight text never could.

I hope that *Active Training* will continually provide you with specific guidance as you reference the book throughout your career, whether you work in a business, governmental, or educational setting. The book is meant to be practical and helpful for you.

Norfolk, VA
April 2015

Elaine Biech

Active **Training**

Part One

Introducing Active Training

.....**T**raining is a method of enhancing human performance. Whenever a person's ability to perform a job is limited by a lack of knowledge or skill, it makes sense to bridge that gap by providing the required instruction.

Sounds simple, doesn't it? Not really. The problem begins with the notion that learning something you don't already know requires another person (a trainer) or medium (a book, a computer) to provide it.

One of Mel's favorite exercises was to cover a wristwatch with the opposite hand and ask those who are observing, "What am I doing?" Immediately, someone would say, "You're covering your watch." He would then request a synonym for the word *cover*. Typically, suggestions such as *hide*, *obscure*, or *block* are given. With this opening, he would say, "The next time *you* have something to cover with a person whom you are training, you might be hiding the information, obscuring it, or completely blocking it from view. That's because, at that moment, it's *your* information and *your* understanding of it. It does not belong to the *other* person." Mel's point was that as trainers we need to think about "how" we are "covering" the topic, making sure that we do not prevent the learner from "uncovering" it; this "uncovering" process only happens by virtue of the learner's own activity. Ultimately, you—or a book or a computer—cannot do the work for the learner.

Active training occurs when the participants do most of the work. If you neatly package the information or elegantly demonstrate the skills, you, not the participants, are doing "the work" for them. No one

is suggesting that well-designed instruction is unnecessary. The key to effective training, however, is how the learning activities are designed so that the participants *acquire* knowledge and skill rather than merely *receive* them.

Yes, there is a whole lot more to training than “show and tell.” Learning is not an automatic consequence of pouring information into another person’s head. It requires the learner’s own mental involvement and doing. Lecturing and demonstrating, by themselves, will never lead to real, lasting learning. Only training that is active will.

In order for people to learn something well, they must *hear* it, *see* it, *question* it, *discuss* it with their peers, and *do* it. They may even *teach* it to someone else in order to solidify their understanding of the information or skill. An active approach to training requires a variety of strategies that promote all six processes—*hearing, seeing, questioning, discussing, doing, and teaching*. Let’s consider more fully why.

THE NATURE OF ADULT LEARNING

Over twenty-four hundred years ago, Confucius declared:

What I *hear*, I *forget*.

What I *see*, I *remember*.

What I *do*, I *understand*.

These three simple statements speak volumes about the need for active learning. As only Mel could do, he modified and expanded the wisdom of Confucius into what he called the Active Learning Credo:

When I only hear, I forget.

When I hear and see, I remember a little.

When I hear, see, and ask questions and discuss with someone else, I begin to understand.

When I hear, see, question, discuss, and do, I acquire knowledge and skill.

When I teach someone, I master what I have learned.

Why Is This Important?

Hearing and Seeing. You’ve probably read “pop data” that insists that participants retain less when listening to lecture and more when what they hear is paired with a visual; they retain even more when they practice by doing. There are several reasons why most adults tend to forget what they hear. One of the most interesting has to do with the rate at which a trainer speaks and the rate at which participants listen.

Most trainers speak at about one hundred to two hundred words per minute. But how many of those words do participants hear? It depends on how they are listening. If the participants are really concentrating, they might be able to listen attentively to about half of what a trainer is saying. That's because participants are thinking while they are listening. It's hard to keep up with a talkative trainer. Even if the material is interesting, it's hard to concentrate for a sustained period of time. Participants probably hear at the rate of four hundred to five hundred words per minute. When they are listening for a sustained period of time to a trainer who is talking more slowly they are likely to get bored and their minds will wander. The upshot? A steady diet of lecture is problematic, because the lecturer and the listener are often not in synch.

To alleviate the audio bombardment of lecturing, master and trainer and CPLP Fellow, Bob Pike, recommends that participants should be given a chance *every eight minutes* to internalize what they have been hearing before it's simply supplanted by the next wave of information (Pike 2003). Ruth Clark (2014) points out that still visuals are helpful to learning; they generally impose less mental load than animated visuals. Still visuals have been shown to be more effective to teach general content (animated visuals are better for procedures). That could be true because between 80 to 90 percent of all information that is absorbed by the brain is visual (Jensen 2008).

When teaching has both an auditory and a visual dimension, the message is reinforced by two delivery systems. It not only helps to use presentation slides along with meaningful words, but several other sources of visual information can be utilized, such as objects, documents, and vivid stories. Some of us prefer one mode of delivery over the other. By using both you have a greater chance of meeting the preferences of more participants.

But merely hearing something and seeing it is not enough to learn it. Let's explore the reasons why.

Ask questions and discuss. The adult brain does not function like an audio or video recorder. The brain doesn't just receive information; it processes it. The brain is suffused with a vast number of networks through which it sorts out all incoming information. Thus, any information already stored influences how and what we understand and eventually learn. Your brain tries to make connections.

If adults discuss information with others and if they are invited to ask questions about it, their brains can do a better job of connecting with information they've already stored. That's because the act of learning begins with a question. The brain starts the work of learning because it has a question about information it is obtaining from the

senses (hearing, sight, touch, and taste) that feed it. If the brain could talk, it would say things like: *Where does this information fit? Does it confirm what I already know? Does it challenge what I already know?*

If the brain isn't curious about incoming information, however, it takes the path of least resistance and attends to something else. Therefore, getting participants to ask questions puts them in a seeking mode rather than a passive mode. Their brains are activated to obtain answers rather than merely "logging in." If participants are asked to listen to a lecture or view presentation slides and they come to it with few or any questions, their brains treat the information superficially. If they are trying to find out something, their brains treat the information carefully.

Better yet, if adults can discuss the information with their peers, they can obtain feedback about how well they understand it. Learning is enhanced if people are asked to do the following with their peers:

- State the information in their own words
- Give examples of it
- Have an opportunity to reflect on the information
- See connections between it and other facts or ideas
- Practice higher-order thinking, such as analysis, synthesis, and evaluation
- Apply it to case situations

Even better is the opportunity to do something with the information. Research conducted at Stanford University (Levin 1996) suggests that the optimal environment for learning allows people at different times to be partners, teammates, and teachers. In a training context, this occurs best when learning teams are organized to engage in "action learning" tasks. They challenge participants to solve problems and apply what they know to real work situations. Furthermore, giving participants the opportunity to learn information or a skill and then teach it to peers allows them the opportunity to discover what Aristotle declared many years ago, "Teaching is the highest art of understanding."

In many ways, our brain is like a computer and we are its users. A computer needs to be "on" in order to work. Our brain needs to be on as well. When learning is passive, the brain isn't on. A computer needs the right software to interpret the data that are entered. Our brain needs to link what we are being taught with what we already

know and how we think. When learning is passive, the brain doesn't make these linkages to the software of our mind. Finally, a computer cannot retain information that it has processed without "saving it." Our brain needs to test the information, recapitulate it, or explain it to someone else in order to store it in its memory banks. When learning is passive, the brain doesn't save what has been presented.

What occurs when trainers flood participants with their own thoughts (however insightful and well organized they may be) or when they rely too often on "let me show you how" demonstrations and explanations? Pouring facts and concepts into participants' heads and masterfully performing skills and procedures actually interfere with learning. The presentation may make an immediate impression on the brain, but without a photographic memory, participants simply cannot retain very much for any period of time, even though they think they will never forget it. As Eric Jensen, author of *Brain-Based Learning*, explains, "The traditional stand and delivery approach is brain antagonistic. The brain is not very good at absorbing countless bits of semantic (factual) information."

In any case, real learning is not memorization. Most of what we memorize is lost in hours. In order to retain what has been taught, participants must chew on it. Learning can't be swallowed whole. A trainer can't do the mental work for participants because they must put together what they hear and see to form a meaningful whole. Without the opportunity to discuss, ask questions, do, and perhaps even teach someone else, real learning will not occur.

Further, learning is not a one-shot event; it comes in waves. It takes several exposures to material to understand. It also takes different kinds of exposures, not just a repetition of input. For example, a software application can be taught with manuals, through classroom exercises, and through an asynchronous online class. Each way shapes the participants' understanding. Even more important is the way in which the exposure happens. If it happens *to* the learner, there will be little mental engagement *by* the learner.

When learning is passive, learners come to the encounter without curiosity, without questions, and without interest in the outcome. When learning is active, learners are *seeking* something. They want an answer to a question, need information to solve a problem, or are searching for a better way to do a job.

David Rock is the director of the NeuroLeadership Institute and author of *Your Brain at Work*. He uses an AGES model that identifies four requirements to embed ideas:

1. Attention must be very high; multitasking dramatically reduces recall. The chemical processes to encode memory are activated when we are very focused.
2. Generating a mental map around the new ideas; participant can't just watch or listen.
3. Emotions need to be high; we only remember things we feel strongly about.
4. Spacing learning is critical.

A high AGES score is required for participants to recall ideas. Attention, generation, emotion, and spacing form the AGES model. Practicing in the form of small group work, gamification, contests, or team teaching can all increase a learning event's AGES score.

Practicing. Quite a few studies have compared learning outcomes among individuals playing a game with individuals assigned to a more traditional instructional method such as lectures or computer tutorials. In these studies the same content is presented in a game version and in a traditional version and learning is measured with a test. In her book *Evidence-Based Training Methods*, Ruth Clark (2014) reports that results aren't clear cut; however, in one study simulation games resulted in learning gains 9 to 14 percent higher than comparison groups. However, the comparison groups learned more than the game groups when taught with active instructional methods. The game groups learned more than the comparison groups when the comparison group was taught with passive instructional methods. Ruth states, "My conclusion from the review is that active engagement leads to learning and any method that incorporates relevant active engagement (with feedback) will lead to better learning than a method that relies primarily on passive learning environments such as lectures or reading."

The bottom line here? Telling is NOT training. As Harold Stolovitch and Erica Keeps suggest in their book, *Telling Ain't Training*, there's much more to it.

THE SOCIAL SIDE OF LEARNING

We all face a world of exploding knowledge, rapid change, and uncertainty. As a result, participants may be anxious and defensive when they show up for training. Abraham Maslow taught us that human beings have within them two sets of forces or needs—one that strives for growth and one that clings to safety. A person who must choose between these two needs will choose safety over growth. The need to

feel secure has to be met before the need to reach out, take risks, and explore the new can be entertained. Growth forward takes place in little steps. According to Maslow, “each step forward is made possible by the feeling of being safe, of operating out into the unknown from a safe home port.”

One of the key ways people feel safe and secure is when they feel connected to other people and are included in a group. This feeling of belonging enables participants to face the challenges set before them. When they are learning with others rather than alone, they have available the emotional and intellectual support that allows them to go beyond their present level of knowledge and skill.

Maslow’s concepts underlie the development of the small-group learning methods that are popular in training circles. Placing participants in teams and giving them tasks in which they depend upon each other to complete the work is a way to capitalize on their social needs. They tend to get more engaged in learning because they are doing it with their peers. Once they have become involved, they also have a need to talk with others about what they are experiencing, which leads to further connections.

Collaborative learning activities help to drive active training. Although independent study and large group instruction also stimulate active learning, the ability to teach through small-group cooperative activities will enable you to promote active learning in a special way. Remember that what participants discuss with others and what they teach others enables them to acquire understanding and master learning. The best collaborative learning methods (see, for example, “Jigsaw Learning” in Chapter 5) meet these requirements. Giving different assignments to different participants prompts them not only to learn together but also to teach each other.

As you begin to practice active training, remember:

- Learners follow a hierarchy to take in information.
- Use a variety of delivery methods to support participants’ learning.
- Adults have a need to feel safe and a part of the group.

CONCERNS ABOUT ACTIVE TRAINING

If this is your first introduction to using an active approach to training and development, you may have questions. These FAQs may answer them.

Is active training just a bunch of “fun and games”? No, it’s not just fun, although learning can be fun and still be worthwhile.

Actually, many active training techniques present participants with unusual challenges that require much hard work.

Does active training focus so much on activity for its own sake that participants don't reflect on what they are learning?

This is a real concern. Much of the value of active training activities comes from thinking about them when they are over and discussing their meaning with others. Don't overlook this fact. You will find many suggestions in *Active Training* to help participants reflect on what they have experienced. Ensure that you design time to process each activity; that's where the real learning often occurs. Add value by giving a few comments after an active training activity to connect what the participants experienced to the concepts you want to get across.

Doesn't active training require a lot of time? How can you cover course material using active training methods? Isn't lecturing more efficient? There is no question that active training takes more time than conventional lecturing, but there are many ways to avoid a needless waste of time. Furthermore, even though a lecture can cover considerable ground, you have to question how much is really learned. Also, remember the "coverage" trap. The more you try to cover, the more you may be hiding.

Can active training methods spice up dry, uninteresting information? Absolutely! When the subject is interesting, it's easy to train. When it is dry, often the excitement of active training methods catches up with the participants and they become motivated to master even boring material.

When you use groups in active training, how do you prevent them from wasting time and being unproductive? Groups can be unproductive if an opening does not include introductions and a warm up at the beginning of the session and group work is not carefully structured from the outset. Participants become confused about what to do, organize themselves poorly, and easily get off task. Or they may do the work as quickly as possible, skimming the surface rather than digging into the material. There are several ways to facilitate participants how to learn in groups, such as assigning roles to group members, establishing group ground rules, and practicing group skills. Many tips and techniques in *Active Training* are geared to this problem.

Can you "group participants to death" using active training? Yes, it can happen. Some trainers overuse groups. They don't give participants enough chance to learn things individually and they don't bring the entire group together enough for teaching and discussion. The key is variety. A variety of learning modalities is the spice

of good training. Several techniques in *Active Training* will give you alternatives to small-group learning.

Is there a danger that participants will misinform each other in group-based active training methods? That certainly could happen, but the advantages of giving learning a social side far outweigh the disadvantages. Anyway, a trainer can always review material with the entire group after participants try to learn it on their own and teach it to each other. And most questions or misinformation should come out when you debrief the activity.

Doesn't it require more preparation and creativity to teach using active training methods? Yes and no. Once you understand the process, the extra preparation and creativity will not feel like a burden. You will feel excited about your training and this energy will transfer to your participants' learning. Until then, you should find that creating ideas for active training can be challenging. At first, you will wonder how in the world you can teach certain topics actively. This is where *Active Training* comes in. It is intended to ease the transition by providing you with several concrete ways to build activity, variety, and participation into your training. These techniques are useful for virtually any subject matter.

I'm sold on active training, but I wonder if my participants will be. Millennials will enthusiastically embrace active training because they are good at learning by doing. They also don't mind the fast pace of activity. If you have other participants who are less accustomed to active training, they may be uneasy initially. They may be used to trainers who do all the work and to sitting back and believing that they have learned something and will retain it. Some participants may also complain that active training is a "waste of time." In the long run, all will benefit from active training. In the short run, they will be less anxious if you introduce active training gradually. If you don't, you may get some resistance.

Your participants need to know what to expect if your approach is new to them. Following is a statement you may wish to use to convey how the training will be conducted.

Welcome to Active Training!

This training session is based on the principles of active learning. The methods we will use are designed to

- Increase participation
- Enliven learning

- Deepen retention
- Encourage application

You will be asked lots of questions, urged to take a stab at an answer, explore, and try things out. You will also work, at times, with others and will be asked to test yourself periodically to see for yourself what you have learned and what skills you possess.

At all times, this session will be guided by the idea that it's not what ***I tell you*** that counts; it's what ***you take away***.

In addition, I will not cover everything about our topic. I want you to feel that you have ***really learned something*** rather than having been ***exposed to everything***. If I do a good job focusing on the most important topics, you will be able to learn the rest of what you need on your own.

THE DELIVERY OF ACTIVE TRAINING

Active Training is based on the assumption that you are training a group of participants at one site in either a physical or virtual classroom setting. An active approach to training, however, is not limited to this delivery mode but can be incorporated into other modes. Since the instructional design principles are essentially the same regardless of how training is delivered, the ideas in *Active Training* can be easily applied to a wide range of training approaches.

The use of e-learning is revolutionizing the way people obtain learning. The advantage of computer technology is its ability to provide more training, delivered sooner, in more places, and potentially at a lower cost, than traditional classroom-based instruction. The value of e-learning is enhanced when it is designed for maximum interactivity. Straightforward presentation of information even if it is replete with visual graphics, limits the learning experience. The use of questions, case problems, and simulations and the inclusion of interactive exercises expand the quality of learning that will be obtained. Such activities can be built into individuals' interactions in e-learning instruction through user input options that enable them to "talk" to the material. To add the social side of learning, it is also possible to bring together, both face-to-face and virtually, people who have experienced the same instruction and give them group activities to reinforce what they learned individually.

What makes learning exciting today is that learners can make their own decisions about how they best learn the material. They can learn in a synchronous physical or virtual classroom or in an asynchronous