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Elaine Biech

Training and Development

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Foreword

Great organizations exist because of great people. Helping those people reach their potential is the work of talent development professionals.

These professionals commit themselves to developing the knowledge, skills, and abilities of others that help the organization achieve its strategic goals and objectives. They hold many titles: trainers, instructional designers, knowledge managers, coaches, subject matter experts, facilitators, and talent developers. Their work is delivering greater impact than ever before. More than just providing training events, these individuals are learning facilitators, collaborators, and partners in helping others achieve their full potential.

While many of these practitioners enter into this profession intentionally, we know that many others are “accidental trainers,” or serve a training role in addition to other responsibilities they have in their company. For both groups, a handy resource like this is important to have. I am so pleased that Elaine Biech agreed to update this book — her expertise is beyond compare, and I can think of no one better to boil down “training and development” to its most essential components.

Training & Development For Dummies is a comprehensive — and fun — look at what comprises the important work of developing others. I encourage you to invest the time to really absorb all Elaine is sharing here. And I hope you’ll also take advantage of the deep resources that our organization — The Association for Talent Development (formerly ASTD) — has to help you grow and strengthen your skills in the field. We serve a global community of practitioners and are committed to providing you great content, a supportive community, and robust tools that will benefit you in your work.

Creating a world that works better is the vision that drives the work we do. We’re glad you’re a part of our community.

— Tony Bingham, President and CEO, Association for Talent Development (formerly ASTD)

Introduction

Training is the best profession in the world. The training professional touches almost everyone every day. Whether you're experiencing a golf lesson, taking a virtual course to learn to use new computer software, working with Leaders Beyond Boundaries in Ethiopia, trying a new recipe, or being coached by your boss, you're learning something new and experiencing training. You and your trainer don't even need to be in the same room or on the same schedule.

What other career affords you the opportunity to increase an organization's bottom line, improve your country's productivity level, and enhance individuals' lives around the globe, all at the same time? It is truly a privilege to be a trainer, yet it's also a responsibility.

Training is a profession on the move, and those moves are ones to be proud of. As I finished this book, the Association for Talent Development (ATD), the trainers' professional association, is almost a year into its new name; has opened an office in China; is designing two new trainer tool apps for virtual learning and a global approach to learning; and is introducing CTDO, a publication to serve senior leaders who develop talent. We are a profession on the move, and this book shows you why.

About This Book

It's been ten years since the first edition of *Training For Dummies* was published. Now with a slightly updated name, *Training and Development For Dummies* incorporates several new elements that mirror the growth of the training and development (T&D) profession.

Training and Development For Dummies is both practical and fun. It has been written in a logical sequence and is loaded with practical ideas. It is designed to take you through a training cycle from start to finish, and in sequential order. So, if you want to, you can start at the beginning of this book and move through to the end. If you're interested in finding only specific information, however, you can also use the index at the back of the book or the Table of Contents near the front.

This book is fun to read, but don't let the conversational tone fool you. It is jam-packed with technical knowledge about the training profession as well as tips, tricks, and techniques for honing your training skills.

The most exciting part is that several leaders in the T&D profession have agreed to contribute snippets of content that focus on their areas of expertise. So, as you read *Training and Development For Dummies*, be sure to check out what experts say — like Michael Allen on agile-based design, Jennifer Hofmann on virtual classrooms, Karl Kapp on gamification, and Thiagi on facilitation.

Foolish Assumptions

While writing this book, I imagine you, the reader, sitting next to me and telling me what you want to read about. And what did I hear you saying? “Practical. Make it practical.” So I did.

I assume you fall into one of two categories: Either you're interested in becoming a trainer, or you're already a part of the T&D profession and want to hone your skills. Perhaps you're even interested in obtaining professional certification from ATD.

I also assume that you've been a participant in training and that some of those training sessions have been life-changing, while others have been a waste of your time. And I assume that you want to know how to conduct more of the former and none of the latter.

I assume that you know how important the training profession is to corporations' bottom lines, individuals' development, happiness, and well-being, as well as your country's productivity.

Finally, I make one other assumption: And that is that you love (or will grow to love) the T&D profession as much as I do!

Icons Used in This Book

Throughout this book, you find icons in the left margins that alert you to information you need to know. You will find the following icons in this book.



Quick tips and tricks to make your job easier and ideas to help you apply the techniques and approaches discussed.



Important information that is critical to being a professional trainer.



A few words that impart wisdom you can rely on.



Many people have made the profession what it is today, and their names and notions are a part of the foundation that trainers rely on to deliver success.



Specific thoughts and ideas that guide what you need to know about the ATD certification.

Beyond the Book

In addition to the material in the print or e-book you're reading right now, this product also comes with some access-anywhere goodies on the web.

Check out the free Cheat Sheet at www.dummies.com/cheatsheet/traininganddevelopment for additional helpful tips on what to do and not do, the seven sins of trainers, ensuring participation, fostering learning, and more.

There were also more goodies than would fit between these pages. You can access these extras at www.dummies.com/extras/traininganddevelopment. There you will find articles on humor in the classroom, fast-tracking Millennials to leadership, how to save time in your classroom, how to facilitate a remote training session, and ways to use social media to help transfer learning — plus an extra Part of Tens chapter only available online.

Where to Go from Here

You can approach this book from several different angles. You can, of course, start with Chapter 1 and read straight through to the end. But you may not have time for that. Check out some other approaches:

- ✔ If you're brand-new to the training scene, you may wish to start with Part I. It grounds you in the topic.
- ✔ If you're looking for ways to enhance your skills in either the design or the delivery area, go directly to Part II or Part III.
- ✔ If you're looking for several fast ways to improve your training delivery or enhance your training session, check out the Part of Tens, where you'll find 50 ideas. You can also skim through the rest of the book and look for the Tip icons, reading each one.
- ✔ If you're thinking about beginning a professional certification process, you may want to go directly to Chapter 16 and read all about it.

No matter where you start reading in this book, you'll find practical ideas. So my advice is to just start!

Part I

So You're Going to Be a Trainer

getting started
with

**Training &
Development**



Visit www.dummies.com for great Dummies content online.

In this part . . .

- ✓ Introducing you to the world of training and development
- ✓ Exploring why adults learn
- ✓ Getting to know the training cycle

Chapter 1

What's Training and Development?

In This Chapter

- ▶ Introducing the training and development profession
 - ▶ Assessing your skills and abilities as a training and development professional
 - ▶ Determining the importance of developing others
 - ▶ Exploring the many hats of a 21st century trainer
-

So you want to be a trainer — a talent development professional. Or perhaps you already are in the field, and you've picked up this book to enhance your skills. In either case, this chapter helps you understand the profession and what's expected of those who develop others.

Having a role in training and development (T&D) is one of the most exciting jobs anyone can have. Although a trainer's role has changed substantially over the past decade and is currently going through another metamorphosis, many of the positive aspects always remain with the job. First, as a trainer you impact the work of many people — not only the learners with whom you work but also supervisors, senior management, clients, vendors, and perhaps even your company's board of directors. As a trainer, you have access to many people and can develop a broader picture of your organization's needs. Trainers are usually good communicators with good information. People listen to you.

In addition, training is exciting because it is a job that is an integral step in an organization's efforts toward change and improvement. You may be a part of defining the organization of today, envisioning the organization of the future, and helping to incorporate the changes necessary to create the new organization. As a trainer, you have the opportunity to influence the direction your organization takes and how it gets there.



Take a proactive stance in shaping your career. To be the most effective trainer, find out all you can about the organization in which you work. What are the primary issues and priorities it faces? Partner with those who lead your organization and find out how you can help them. Where are the pressure

points that affect the bottom line? Identify how your work can positively impact the bottom line, given that you're in a unique position to impact others. At the same time, remember to also take the opportunity to impact your career.

In this chapter, you answer three big questions.

- ✓ What is training and development and who uses it?
- ✓ What do trainers do?
- ✓ Do you have what it takes to be a trainer?

What Is Training and Development?

We've all been in training since the day we were born. You have been learning and changing into the knowledgeable, skilled adult you currently are. Everyone has received training, and we have also all developed others. If you ever demonstrated the phone system to a new employee, advised your boss regarding changes in your department, or explained a shortcut for completing a task to a colleague, you were conducting training.

Training is about change. It is about transformation. It is all about learning. Training is a process designed to assist an individual to learn new skills, knowledge, or attitudes. As a result, individuals make a change or transformation that improves or enhances their performance. These improvements ensure that people and organizations are able to do things better, faster, easier, and with higher quality.

What forms does T&D take?

Learning is acquired in many forms. You may have experienced some of these. You may have a one-on-one session with your supervisor to learn the benefits of a new product your company produces. You may attend a class to upgrade your negotiating skills. You may take an asynchronous online course to learn how to use a new computer program. You may take a golf lesson to learn how to improve your use of long irons. You may be coached by someone in your company to learn to be more politically savvy. You may register for a Massive Open Online Course (MOOC) to learn leadership skills. The key word in each of these examples is "learn." The reason training is provided is so that someone (or many people) learns something in order to make a change.

Is there really a difference between the words *training* and *development*? It seems all professionals in the business have their own definitions, and we

aren't going to resolve a mutual definition in this book. Both concepts are paths to learning and performance. In general people view training as those learning options that include someone who facilitates the learning in a formal setting: classroom, workshop, seminar, virtual instructor-led, or synchronous online. Development, on the other hand, is viewed as more self-directed and informal: coaching, mentoring, reading, self-study, social learning, on-the-job learning, and asynchronous online learning. And there is no denying that learning also occurs during water cooler discussions, in cubical conversations, and at conferences. Trainers are involved in all of these training and development alternatives.



Read that last sentence again and remember it. It doesn't matter what your official title is or how you deliver learning and performance. Trainers may be involved in *all* activities where people are learning knowledge and developing skills. Yes, you may design or deliver training in a traditional or virtual classroom. But you may also coach supervisors about the best way to develop their employees or advise leaders of corporate changes required to support desired performance — or even recommend budgets for social media to augment training. In this book I use the title *trainer* to describe all these roles.

Trainers are necessary in every industry, from aardvark ranches to zipper manufacturers. Trainers have jobs in private industry, education, not-for-profit organizations, and government.

Trainers work with people in all positions and at all levels in an organization: executives, managers, supervisors, secretaries, production workers, scientists, artists, doctors, lawyers, security guards, salespeople, teachers, firefighters, authors, custodial workers, waitstaff, and you. Even this book is a form of training — self-directed training as you learn your way through its pages.



The training profession's evolution

Training has been around since the Stone Age. It's not likely that train-the-trainer seminars existed in 2000 B.C. Yet without some natural way to transfer skills and knowledge, people would never have progressed from the first wheel on a muddy road to the computer chips that guide our exploration of outer space. Probably the first documented training occurred in the 18th century, when artisans

and craftsmen formed apprenticeships that utilized a demonstration-practice-feedback-practice-again process.

It wasn't until 1944 that training was organized under one banner, The American Society for Training Directors. The association later changed its name to The American Society for Training and Development (ASTD).

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Two influential professionals helped to shape the early years of the profession. In the 1960s, Malcolm Knowles advanced the idea of *andragogy*, a learning theory for adults, distinct from *pedagogy* for children. This tipped the scale toward a more learner-centered approach as opposed to a content-centered approach. Len Nadler coined the term *Human Resource Development* and added structure and organization to the field.

The 1990s reinforced the critical role trainers played in helping organizations achieve their business goals. In the “Why is training necessary?” section in this chapter, I mention the importance of aligning the four requirements of the organization when budgeting for training: business, performance, learning, and environmental needs. Trainers ensure that performance, not just learning, occurs to support the bottom line. The field embraced a *Workplace Learning and Performance* perspective, encouraging some organizations to call their trainers “workplace learning and performance professionals.” Quite a mouthful! With the advent of

workplace analytics, or “big data” as it is sometimes called, businesses are finding ways to measure the effects of training on the business.

But another role clarification was in the making. As we move well into the 21st century, it is clear that training and development professionals continue to accept a greater role that impacts the total organization's success. Today this broader role includes change management, coaching managers to develop their people, succession planning, engagement and retention efforts, and implementing organizational assessments. This broader role deserved a more impactful name.

During this time, ASTD had become the world's leading association for training and development. The name American Society for Training and Development no longer represented the expanded role of the profession, nor the global reach of the association. Therefore, in 2014 the professional group that represents training and development became the Association for Talent Development (ATD).

Why is training necessary?

Every year, most organizations budget money for training — over \$70 billion in the United States and over \$130 billion worldwide. The volume of money and effort suggests that corporations believe training is important. What do they know about training that justifies this much investment? For starters, training plays an important role in developing a productive workforce and finely tuning processes to increase profits. Training also helps people and organizations manage change. Because organizations are continuously changing techniques, goals, equipment, people, and locations, all members of the workforce require training to support these changes.

There are four critical aspects of a coordinated comprehensive training approach. In the most efficient organizations, the four are aligned toward the same corporate goals.

- ✔ **There is a business need or requirement.** This is the starting point. Effective training starts with the clarification (or creation) of organizational goals. This enables the T&D department to provide a strategic approach to the services it offers the organization. Examples of business needs include increasing customer satisfaction, increasing market share, and improving quality.
- ✔ **There is a need to improve or change performance.** Performance is usually tied to a specific job and a task or set of tasks within that job. It is what the employee must do to achieve the organizational goal. For example, if improving quality is a business goal, each employee must know what process to use to ensure delivery of a quality product or service.
- ✔ **There is a need to gain knowledge or to learn new skills.** In order to change performance, employees may need to learn something new. This learning may take many forms such as coaching, classroom training, computer-based training (CBT), on-the-job training (OJT), or self-study.
- ✔ **There is a need for change in the environment.** At times, employees may possess the skills and knowledge required to change their performance, but some aspect of the environment either prevents or discourages individuals from making the change. For example, if an organization's goal is to improve quality, there will be little change if the reward system focuses on quantity, not quality.



Trainers are involved in providing services that address all these aspects. If you're a beginning trainer, you'll most likely start with interventions that deliver knowledge and new skills (the third bullet in the preceding list). This is the traditional "training" role. However, as you grow professionally, you will be required to provide learning or all of the other needs that affect an organization. You will create and deliver formal and informal learning, instructor-led and self-directed learning, and synchronous and asynchronous training. You will do this in a classroom, online, and on the job. For ease of reading, I identify all these roles using the traditional name trainer.

What do organizations expect to accomplish by investing in training efforts? They desire change in performance of employees in order to:

- ✔ Reduce employee turnover
- ✔ Maintain current customers
- ✔ Create new customers
- ✔ Increase customer satisfaction
- ✔ Reduce errors

- ✓ Reduce expenses
- ✓ Save time
- ✓ Add dollars to the bottom line

There are many reasons people require training in the workplace. Some of these reasons are to:

- ✓ Orient new employees
- ✓ Provide long-term professional development
- ✓ Upgrade knowledge required for the job
- ✓ Introduce new skills to experienced employees
- ✓ Change career paths due to job elimination

But won't trainers run out of people to train? Not likely. Organizations are required to continually make changes. Technology advances continue to influence how trainers do their jobs. The skilled labor pool continues to shrink worldwide. Thousands of new employees enter the workforce or change jobs every week. That keeps at least a few trainers busy.

Is training just for business?

You experience training in other parts of your life in addition to the workplace. For example, you may decide you want to play the piano or practice yoga. You may want to find out more about your ancestors or Italian artists. If so, you'll likely locate someone who teaches these subjects at your local college, community center, or online. In this way, individuals seek training for a variety of reasons outside the workplace to:

- ✓ Learn new skills (try a new hobby such as painting or growing bonsai)
- ✓ Enhance skills you already have (take a tennis lesson to improve your game or a gourmet-cooking lesson to learn new techniques)
- ✓ Acquire knowledge about a subject that intrigues you (attend a class about African history or investing in the stock market)
- ✓ Gain information you require due to a life change (attend a class to learn to care for your elderly parent or learn how to prepare for retirement)

Training is available for all areas of your life.

What Do Trainers Do?

The trainers' roles, they are a-changing, and many new roles are currently being defined in the T&D arena. The following list provides just a sample of the trainer roles and titles that are emerging.

- ✓ Career coach
- ✓ Chief learning officer
- ✓ Competency expert
- ✓ Computer-based training designer
- ✓ Continuous learning coach
- ✓ Corporate trainer
- ✓ Courseware designers
- ✓ Curriculum development specialist
- ✓ Employee development specialist
- ✓ Executive coach
- ✓ Facilitator
- ✓ Global T&D facilitator
- ✓ Instructional designer
- ✓ Instructional technologist
- ✓ Instructor
- ✓ Knowledge manager
- ✓ L&D specialist
- ✓ Leadership trainer
- ✓ Manager of strategic initiatives
- ✓ Media designer
- ✓ Multimedia engineer
- ✓ OD consultant
- ✓ Organizational effectiveness specialist
- ✓ Performance analyst
- ✓ Performance consultant
- ✓ Performance technologist
- ✓ Talent development professional
- ✓ Technical trainer
- ✓ Virtual facilitator
- ✓ Workforce diversity director
- ✓ Workplace learning and performance professional

Even though the preceding list uses wildly different words and appears to be quite diverse, all of these roles play a part in ensuring that people gain knowledge or skills, or change attitudes. In the “Why training is necessary” section in this chapter, I mention that beginning trainers usually start with interventions that design and deliver knowledge and new skills. This traditional “training” role remains the mainstay of the profession. For ease of my writing and your reading, I refer to all roles as training.

The 2014 *ATD State of the Industry Report* says that almost 70 percent of learning involves a trainer, and this is unchanged from previous years. Fifty-five percent occurs in an instructor-led classroom, nine percent utilizes an online instructor, and five percent is led remotely by an instructor.

The two roles (design and delivery) can be further subdivided into two main categories. All training professionals are involved with designing and/or presenting a learning experience. Whether you design, deliver, or do a bit of both, you have two aspects to master: content and process.

- ✓ **Content:** Whether you're designing or presenting, you need to truly understand what others need to know about the topic. Get inside the topic and find out more than what's offered in your trainer's manual. Ask more questions of more people if you're designing. Talk to *subject matter experts*, often called *SMEs* in the profession. The content is based on your organization's needs.
- ✓ **Process:** Both design and delivery have methods that you incorporate into your training task. Design methods incorporate skills such as designing participant materials, incorporating adult learning principles, and selecting methods for the perfect blended learning program. Delivery methods incorporate skills such as facilitating group process, presentation skills, and managing disruptive participants. This is true for both face-to-face and online learning.

This book provides tips and techniques for both content and process.

Assessing your training potential

Every career has its own set of characteristics that increase the chances that someone will enjoy the job and have a natural aptitude for the work that is done. The following list identifies a number of those characteristics for a trainer.

- | | |
|-------------------------------|----------------------------------|
| ✓ Approachable | ✓ Impartial and objective |
| ✓ Articulate | ✓ Lifelong learner |
| ✓ Assertive and influential | ✓ Patient |
| ✓ Both logical and creative | ✓ Process-oriented |
| ✓ Builds trust | ✓ Self-sufficient |
| ✓ Confident and poised | ✓ Sense of humor |
| ✓ Customer-focused | ✓ Solution- and results-oriented |
| ✓ Enjoys helping others learn | ✓ Strong business sense |
| ✓ Enthusiastic | ✓ Team player and partners well |
| ✓ Excellent communicator | ✓ Technologically literate |
| ✓ Flexible and spontaneous | ✓ Tolerant of ambiguity |
| ✓ Global mindset | ✓ Well-organized |
| ✓ Good listener | |