BEST PRACTICES FOR TRAINERS

Agenda

- Thank You
- Roles and Responsibilities
- Addressing Challenges
- Online Courses

Supplemental Information

- General Training Preparation and Practices
- Training Delivery Tips
- Trainer/Facilitator Checklist
- Trainer/Facilitator Contingency Plan

Roles and Responsibilities

Lead Instructor Role

The Lead Instructor should:

- Manage classroom sessions

Lead Instructor Role

The Lead Instructor should:

- Manage classroom sessions
- Present new concepts and procedures

Lead Instructor Role

The Lead Instructor should:

- Manage classroom sessions
- Present new concepts and procedures
- Lead and support learners in completing exercises

Lead Instructor Role

The Lead Instructor should:

- Manage classroom sessions
- Present new concepts and procedures
- Lead and support learners in completing exercises
- Communicate questions to agency Training Coordinator or the SCEIS Training team

Lead Instructor Role

The Lead Instructor should:

- Manage classroom sessions
- Present new concepts and procedures
- Lead and support learners in completing exercises
- Communicate questions to agency Training Coordinator or the SCEIS Training team

During a presentation, a Lead Instructor should:

- Communicate clearly

Lead Instructor Role

The Lead Instructor should:

- Manage classroom sessions
- Present new concepts and procedures
- Lead and support learners in completing exercises
- Communicate questions to agency Training Coordinator or the SCEIS Training team

During a presentation, a Lead Instructor should:

- Communicate clearly
- Manage a positive learning environment

Lead Instructor Role

The Lead Instructor should:

- Manage classroom sessions
- Present new concepts and procedures
- Lead and support learners in completing exercises
- Communicate questions to agency Training Coordinator or the SCEIS Training team

During a presentation, a Lead Instructor should:

- Communicate clearly
- Manage a positive learning environment
- Assist the facilitator with monitoring the class for key signals

Lead Instructor Role

The Lead Instructor should:

- Manage classroom sessions
- Present new concepts and procedures
- Lead and support learners in completing exercises
- Communicate questions to agency Training Coordinator or the SCEIS Training team

During a presentation, a Lead Instructor should:

- Communicate clearly
- Manage a positive learning environment
- Assist the facilitator with monitoring the class for key signals
- Use effective time-management skills

Class Facilitator Role

The Facilitator will:

- Assist with attendee sign-in and room preparation
- Monitor learners' needs for one-on-one assistance
- Assist lead instructor
- Assist with Q&A response/notes
- Assist with clean-up after session

Training Coordinator Role

- Be the central point of contact between the SCEIS Team and the agency for coordination of in-house training.

Training Coordinator Role

- Be the central point of contact between the SCEIS Team and the agency for coordination of in-house training.

- Provide answers to questions about training facilities and equipment, and coordinate to ensure agency training rooms are technically ready for training

Training Coordinator Role

- Be the central point of contact between the SCEIS Team and the agency for coordination of in-house training.
- Provide answers to questions about training facilities and equipment, and coordinate to ensure agency training rooms are technically ready for training
- Develop the agency's in-house training schedule, within the guidelines that the SCEIS Team will provide

Training Coordinator Role

- Be the central point of contact between the SCEIS Team and the agency for coordination of in-house training.
- Provide answers to questions about training facilities and equipment, and coordinate to ensure agency training rooms are technically ready for training
- Develop the agency's in-house training schedule, within the guidelines that the SCEIS Team will provide
- Submit the agency's in-house training schedule to the SCEIS Team

Training Coordinator Role

- Be the central point of contact between the SCEIS Team and the agency for coordination of in-house training.
- Provide answers to questions about training facilities and equipment, and coordinate to ensure agency training rooms are technically ready for training
- Develop the agency's in-house training schedule, within the guidelines that the SCEIS Team will provide
- Submit the agency's in-house training schedule to the SCEIS Team
- Coordinate with SCEIS to assist with registration for in-house classes on the schedule, and coordinate schedule adjustments with the SCEIS Team to ensure all users are trained, and their completions are recorded.

Training Coordinator Role

- Be the central point of contact between the SCEIS Team and the agency for coordination of in-house training.

- Provide answers to questions about training facilities and equipment, and coordinate to ensure agency training rooms are technically ready for training

- Develop the agency's in-house training schedule, within the guidelines that the SCEIS Team will provide

- Submit the agency's in-house training schedule to the SCEIS Team

- Coordinate with SCEIS to assist with registration for in-house classes on the schedule, and coordinate schedule adjustments with the SCEIS Team to ensure all users are trained, and their completions are recorded.

Addressing Challenges

Awkward Situations

Issue	Options
Lose track of where you are	▪ Stop and take time to think
Unable to finish the course in time	▪ Take a break to rethink your planning
The trainees do not follow	▪ Ask (open) questions to find out what is unclear and why ▪ Take one or more steps back
Arguments between trainees or with instructors	▪ Stay calm and do not get involved in the argument itself ▪ Take time to listen and try to understand what is going on ▪ State that the topic may need to be tabled to stay on track
People dominating the discussion	▪ Ask questions to participants who have not been saying much ▪ Give non-verbal clues, such as avoiding eye contact and writing on the board ▪ Speak to challenging participants during the break
Silence	▪ Let the silence last for a little while (not too long) since silence often makes people talk ▪ Use open questions

Managing the Unknown

- Use a parking lot for questions and topics requiring research
- Have a plan but be prepared to be flexible; unplanned breaks may help with managing the unexpected
- Avoid prolonging delays in class; use impromptu breaks to assess next steps
- User humor carefully
- DO NOT voice frustrations regarding the system, policies, organizational changes, etc.
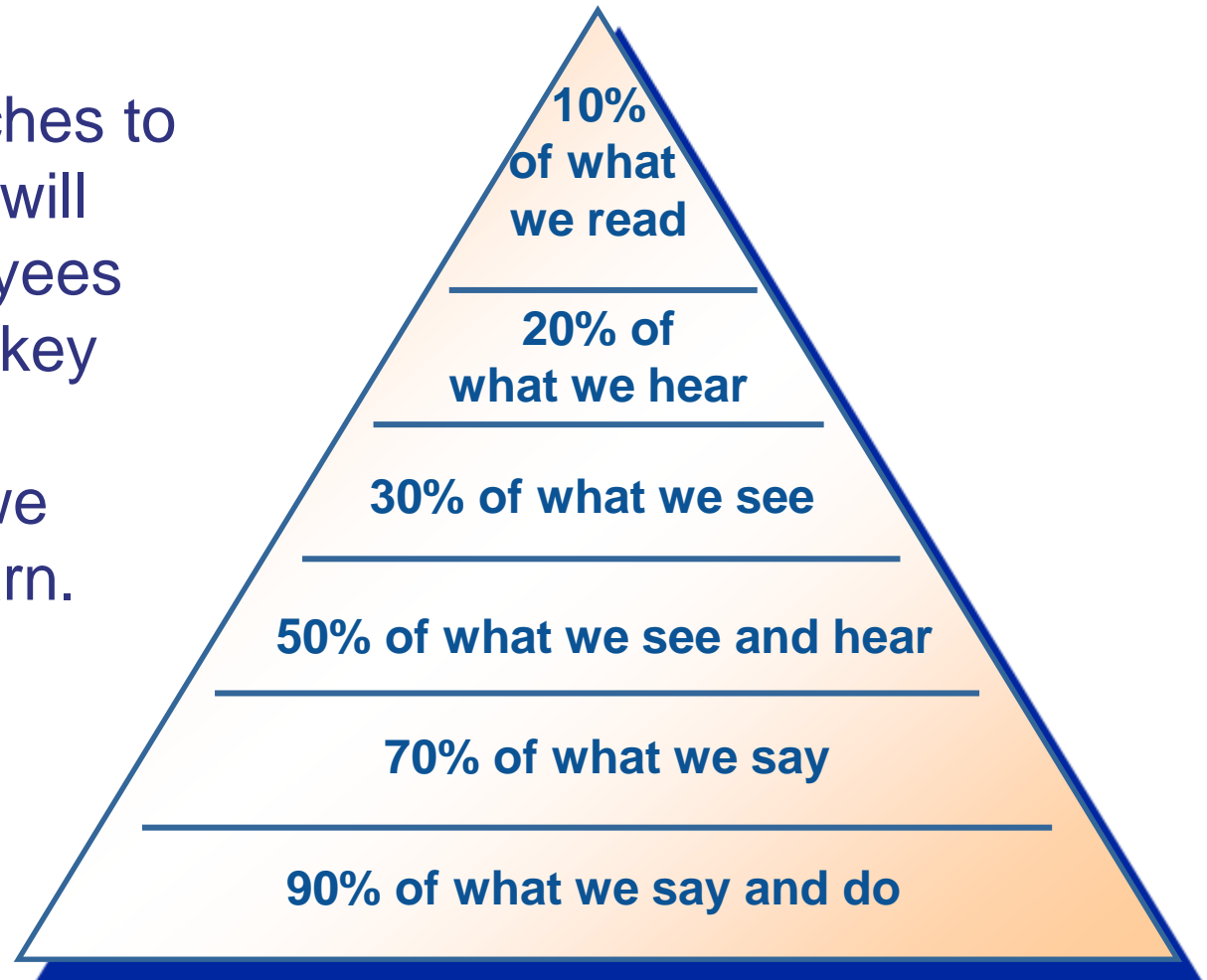- Smile and have fun

Questions

Appendix: Training Delivery Tips

We Tend to Remember

Multiple approaches to training delivery will help your employees better retain the key concepts and processes that we want them to learn.

10%
of what
we read

20% of
what we hear

30% of what we see

50% of what we see and hear

70% of what we say

90% of what we say and do

General Presentation Skills

- **Non-verbal cues**:
  - Dress professionally (and/or look professional)

General Presentation Skills

- **Non-verbal cues**:
  - Dress professionally (and/or look professional)
  - Be enthusiastic and energetic

General Presentation Skills

- **Non-verbal cues**:
  - Dress professionally (and/or look professional)
  - Be enthusiastic and energetic
  - Stand up straight while maintaining a natural position

General Presentation Skills

- **Non-verbal cues**:
  - Dress professionally (and/or look professional)
  - Be enthusiastic and energetic
  - Stand up straight while maintaining a natural position
  - Avoid cologne/perfume due to small rooms and the potential for participants to have allergies

General Presentation Skills

- **Non-verbal cues**:
    - Dress professionally (and/or look professional)
    - Be enthusiastic and energetic
    - Stand up straight while maintaining a natural position
    - Avoid cologne/perfume due to small rooms and the potential for participants to have allergies
    - Maintain good eye contact throughout the room

General Presentation Skills

- **Non-verbal cues**:
  - Dress professionally (and/or look professional)
  - Be enthusiastic and energetic
  - Stand up straight while maintaining a natural position
  - Avoid cologne/perfume due to small rooms and the potential for participants to have allergies
  - Maintain good eye contact throughout the room
  - Change positions or walk to various areas of the room

General Presentation Skills

- **Non-verbal cues**:
    - Dress professionally (and/or look professional)
    - Be enthusiastic and energetic
    - Stand up straight while maintaining a natural position
    - Avoid cologne/perfume due to small rooms and the potential for participants to have allergies
    - Maintain good eye contact throughout the room
    - Change positions or walk to various areas of the room
    - Don't move around too much. Do not point with your finger directly at people

Introductions

- Before you begin a class, you must get the attention of the participants
  - Introduce yourself
  - Agenda review
  - Participant introductions
  - Class expectations
  - Ground rules/housekeeping
  - Parking lot
  - Fun fact

Guidelines for Using Visuals

- Visuals such as flipcharts, PowerPoint, and white boards are key delivery mechanisms
- Remember:
  - Speak to the participants, not to the visual aid
  - Do not read, but paraphrase instead
  - Ensure that the visual aid assists communications, not hinders it

Appendix: General Training Practices and Preparation

Covering all the Bases

Know your plan, subject, environment and audience

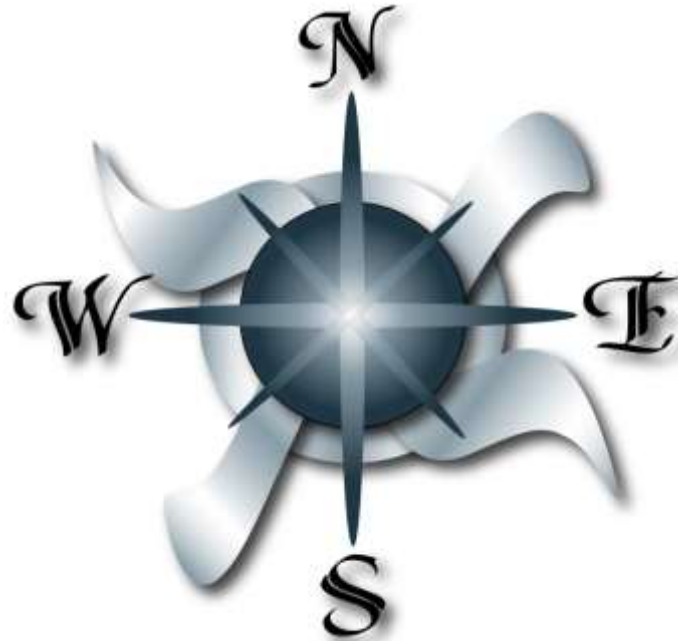# Know Your Plan:
Course Management / Delivery

- In order to be an effective trainer, facilitator, or instructor there are several key elements to keep in mind:
  - Have a plan for how to begin your day, how to facilitate the unexpected and how to end your day
  - Your presentation skills will assist the class participants in learning and retaining the course content.
  - Your delivery style / techniques will set the tone for the class

Insure that you coordinate your plan with your facilitator(s).

Know Your Plan:
Foster a Positive Experience

Instructors may impact the class by:

- Conveying interest / enthusiasm
- Being organized
- Actively involving the students
- Developing rapport with the class
- Calmly adjusting to the unexpected

Know Your Plan:
Pre and Post Class Activities

Pre Class Activities:

- Practice and review your materials

Know Your Plan:
Pre and Post Class Activities

Pre Class Activities:

- Practice and review your materials
- Use trainer's check list as a guide

Know Your Plan:
Pre and Post Class Activities

Pre Class Activities:

- Practice and review your materials
- Use trainer's check list as a guide
- Arrive at least 30 minutes before class to ensure that the room is properly prepared and to be available as students arrive

Know Your Plan:
Pre and Post Class Activities

Pre Class Activities:

- Practice and review your materials
- Use trainer's check list as a guide
- Arrive at least 30 minutes before class to ensure that the room is properly prepared and to be available as students arrive
- Distribute handouts and display presentation

Know Your Plan:
Pre and Post Class Activities

Pre Class Activities:

- Practice and review your materials
- Use trainer's check list as a guide
- Arrive at least 30 minutes before class to ensure that the room is properly prepared and to be available as students arrive
- Distribute handouts and display presentation

Post Class Activities:

- Clean the training room

Know Your Plan:
Pre and Post Class Activities

Pre Class Activities:

- Practice and review your materials
- Use trainer's check list as a guide
- Arrive at least 30 minutes before class to ensure that the room is properly prepared and to be available as students arrive
- Distribute handouts and display presentation

Post Class Activities:

- Clean the training room
- Complete any follow-up communications (research answers to questions, send emails, etc.)

Know Your Plan:
Pre and Post Class Activities

Pre Class Activities:

- Practice and review your materials
- Use trainer's check list as a guide
- Arrive at least 30 minutes before class to ensure that the room is properly prepared and to be available as students arrive
- Distribute handouts and display presentation

Post Class Activities:

- Clean the training room
- Complete any follow-up communications (research answers to questions, send emails, etc.)
- Submit student sign-in sheet

Know Your Subject

- Review the PowerPoint material closer to your first class
- As a refresher, complete exercises a day or two prior to your first class
- Consider conducting a teach-back session to a small, select group before your first class
- Review uPerforms
- Ask the SCEIS team for clarification if needed

Know Your Environment

- Training environment and facilities are a key part of a successful training event

- Participants may not be able to concentrate if items within the environment are faulty

- Check these items prior to the start of class:
  - Review Trainer's Checklist
  - Presentation device, like an overhead projector with a screen
  - Specific equipment (e.g. computers, printers, video & monitor)
  - PowerPoint presentation
  - Handouts / Exercises
  - Layout of the training room; note any potential challenges and prepare to adjust accordingly
  - Room temperature
  - Make sure you have a sign-in sheet roster
  - Flip charts with markers