2000

Inside Pandora's Box-Training 101: Be Prepared! That's the Trainer's Marching Song

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Recommended Citation
DOI: http://dx.doi.org/10.7771/2380-176X.3080

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Introduction

Until this past year and a half, I’ve spent most of the last 15 years of my professional career in academic law libraries which are microcosms of the general academic library in terms of organizational structure and focus. I can remember my first year and the first time I had to train staff members to use the new online system that the library had just installed for verification, ordering, payments and cross-training. We had been to an official lecture and demonstration several weeks before as we were walked through the different procedures of the subsystem. By the time the actual installation took place, even I couldn’t remember just what had been covered, and so I tried to do a “refresher course” for the staff who seemed bewildered, irritated and resistant. Following suit from the first training, I approached this task as many do, with a combination of lecture, demonstration and then hands-on interaction. To my surprise, the staff members didn’t pick it up as I thought they would or should and were generally frustrated with me and I with them. These were generally intelligent, cooperative folks, so I wondered: What was going on? Why wasn’t this working?

Training or Education?

Upon doing some background reading, I realized that first of all, I was laboring under the idea that training staff was similar to an educational experience, like college. Right? Wrong! Here are some of the basic differences in the experience of education and the experience of training.

First, regarding the teaching of the experience, education usually starts with a review of what has been and is known about a subject with added analysis by the teacher. The idea is to give the learner a broad perspective of the subject matter. Consequently the subject matter in traditional education is often focused on concepts and ideas. Training, on the other hand, is focused on the direct acquisition of skills and techniques. Education is focused on the understanding and acquisition of specific areas of information while training is focused in the application, the actual doing of what you were trained to do.

Second, the role of a teacher as opposed to a trainer is fundamentally different. In traditional education, the teacher is seen as an authority, the source of the information you need, while the trainer’s role in the process is more often that of facilitator or coach. The student’s role in traditional education is most likely to be a passive consumer of relevant information while the trainee’s role is more of an active participant in an interactive learning process.

Third, regarding the commitment and evaluation of training and traditional education, education generally requires a substantial time commitment that’s measured in months or years and is evaluated in reviews of professors by students. In addition, in traditional education, the learning experience is measured by teachers through tests, research papers, and presentations. Training, on the other hand, is usually a short-term commitment of hours, days or weeks, with the review often as not being conducted by the instructor or an outside observer and the measured success coming from the trainee’s ability to put into practice the goals and objectives of the training.

Recently, I read an article by D. Scott Brandt, technology training librarian at Purdue University Libraries, in the February, 1999 issue of Computers in Libraries. Mr. Brandt makes an important distinction between training, instruction, and teaching in regard to computer literacy. Briefly, training involves “the mechanics of whatever it is you are working with, either to do work or achieve a goal.” 3 Training someone to use a piece of software, however, in order to be effective, will involve instruction or, as Brandt calls it “conceptual training.” 4 to instill some basic understanding to allow the person trained to use the software in a situation where variables present themselves. If you are working with a fund-accounting system, it helps to understand how the pay files are structured with the greater subsystem in order for the person to be able to recognize and react properly. Finally, learning takes place over a much longer span of time and involves the ability of the person trained to solve problems that may present themselves and affect appropriate solutions based on their training and instruction.

Creating the Organizational Climate

Eventually, however, you want to create an organizational climate where training becomes the catalyst for the employee’s self-motivated quest for learning, where the employees all take the responsibility for their own
equately tailored for our particular work setting that, at least for the time being we are our own best source of training for most technical and even culturally-related programs like customer service and sexual harassment in the workplace programs. How can an outside individual know, with considerable study, what is required of the actual jobs, the open internal barriers caused by institutional structures or procedures that many of us must maneuver around to accomplish what is required of us? How do you tell a trainer that you have a backwardly focused accounting office and therefore electronic invoicing is, at that time, unfeasible? There are often organizational barriers that exist in the realm of the unspoken but are understood by those within the organization. Outside trainers often do not have time to talk with staff and as a result the presentations lack the depth to be truly adequate.

Secondly, Shank indicates that we don’t often involve the right people to accomplish the task in a manner beneficial to the people being trained. Shank also recommends using internal trainers and communicating with the supervisors and staff before the first training session ever starts. Also, the person who knows the subject matter most thoroughly may not actually be the best selection for training. Here’s a bit of advice: Ask the supervisor if the people were able to do what they were supposed to have learned. Did they seem to have understood the basic concepts? This can, if you let it, provide invaluable feedback.

I suspect that in library situations, just like other managerial situations, we actually don’t want to know how well our idea or program either succeeded or failed. We seem to have a terrible fear as professionals of having something, some idea we have tried not work. Librarians have, in private conversations over the years, expressed the fear that recognizing their own professional failures means loss of face for themselves as persons and professionals. We talk about developing organizations with “entrepreneurial spirit” and fostering creative thinking, yet, often we do not tolerate failure from our supervisors and staff. Failure is a wonderful teacher and an organization that can’t fail once in a while, cannot grow. In short, if a training program doesn’t work, instead of hiding it or blaming, try acknowledging it and then analyzing why it didn’t work. Sounds simple; doesn’t it, but it takes great courage to evaluate and then analyze what you’ve done. I would suggest that the simple anonymous checklist evaluation forms are most often inadequate for real feedback. People should be given the opportunity to constructively critique a program afterward without fear of reprisal or rebuke. These are guidelines that need to be spelled out as the training session opens and a dialog between trainer and trainee established from the beginning. You will want to establish a “Question-led” learning environment. This is another reason your choice of people is critical to the success of any training program.

This leads into a fourth area of mismanagement for training programs. We need to establish a conducive atmosphere for training. This can be psychological as mentioned earlier and/or it can have to do with the physical environment. How many times have you found yourself crowded around a monitor with say, three or four other people straining to see what’s happening or straining to hear what’s being presented? These are seemingly

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obvious physical elements that are often overlooked to the detriment of the experience. Many of us in smaller institutions do not have access to training rooms but we still need to try to create as conducive an atmosphere as possible for learning. That also means allowing enough time for people to absorb and to let their minds absorb. Recent studies have shown that there are actual limitations to what we can comprehend within a certain span of time. Have you ever reached the stage in a lecture or presentation, even when you were actually interested, when you realized you had stopped paying attention and were no longer absorbing the information? Good training sessions are not marathons, but have frequent breaks. I went to an interactive computer training session recently where we broke about every 90 minutes. I was surprised how much I had absorbed at the end of the day.

So What is the Best Method for Training?

First, you must plan for training. How many times have you gone to a session or class and realized the person there wasn’t really ready to train you? With whom are you talking? Is this group primarily supervisors or paraprofessional? What is their level of education, of experience with the company? You will also need to do detailed task analyses of those procedures that you are trying to communicate in your presentation. Once you have your environment and are yourself practiced and prepared, then the basic format is as follows. Tell the trainees what is going to happen, what will be taught and why, and where this learning experience fits into the greater picture. This is often referred to as establishing the context of the learning experience.

Next, in a step-by-step manner, demonstrate the procedure or process. If everyone can’t have a hands-on, interactive experience, this is the time to have a well-prepared handout that people can at least follow. Remember to keep explaining why you are doing the training a certain way. If possible, get the person to perform the procedure or process for you. This often gives you a clue as to their level of absorption and understanding. If they don’t seem to understand or can’t replicate your demonstration, work through it again with the person and have them repeat it for you. Watch out for the trainee who freezes up mentally when asked to demonstrate. This is a form of test anxiety and doesn’t mean the person has not absorbed the material. This requires patience on the trainer’s part and that can be a learned skill. After all, the lack of absorption is not necessarily a reflection of your skill as trainer and is not personal.

Keep in mind that the goal is that your trainees learn what is needed. Even their criticism of your style and methods can be a reflection of their own fears of failure. As in change management, people placed in a training situation are placed in a form of psychological and emotional limbo. They may see this experience as a threat to their competency, their status in the organization, their perception of themselves. You as a trainer are actually helping them make the transition from one set of behaviors to another and to a greater understanding of themselves in the process.

Many “slow learners,” if treated with respect and patience, can become your most successful learners. Everyone learns at a different pace and everyone eventually “plateaus” as to how much they can absorb. Don’t forget to get the feedback. Evaluate the situation, yourself, the teaching aids, and the audience. This is probably best done in a group setting.

Second, we learn by doing. One of the most effective training methodologies is called interactive learning or the old “learn by doing.” I know that many corporations and law firms engage in what is called wilderness training and outdoor games in order to teach their highly cooperative people the value of teamwork, cooperation, and personal loyalty. This idea of teaching through games is new to educators or to anyone who has worked with children. The point is that humans appear to learn most effectively when they can interact personally with that which

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they are to learn. This is why role-playing has been demonstrated as a very effective way to communicate behavior modification such as customer service training, diversity awareness and workplace codes of conduct. That’s right. There is a major movement in business to retrain employee codes of conduct regarding personal interactions and work relationships. An old idea long overdue. This is where our friend, the computer can be of service.

Third, use all means available to get the job done. What teaching aids work best in a training situation? The simple and most often correct answer is it depends on what type of training you’re trying to do. For instance, the written manual — if it’s well written — is a good support mechanism for learning routine tasks.

Other Approaches

A good way to use existing technology while incorporating the “interactive” approach to learning is with interactive computer training modules. Many companies have developed these as a way of letting people learn at their own pace. Then those that need more time are not rushed through the procedures and may even repeat those sections they did not get the first time.

Another method gaining popularity is teleconferencing as a way of reaching employees at several locations and/or when time and money do not permit travel to a central training facility. Ideally, the trainee can see and interact. Also, teleconferencing takes a bit of coordination on scheduling between the different organizational components. Most experts agree that supervisor support of telecommuting training programs is critical to their success. Studies have shown that many supervisors are threatened by the telecommuting phenomenon, fearing it will eventually lead them to obsolescence. In her article in the January 1999 issue of HR Magazine, Lin Grensing-Pophal stresses the need for training supervisors as well as employees to use a team training approach both as a follow-up to establishing teleconferencing as a work-option and training method. In fact, all levels of an organization must be trained to be able to manage what amounts to organizational change.

Another teaching aids include the now standard audio and video formats. The growth of multimedia and workplace training programs has been nothing short of astounding in recent years. If anything, there is a glut of these types of teaching aids and hence, caution should be taken before making an investment in this type of training aid. Most experts agree that such devices are most effective in teaching routine tasks, giving tours, etc. Most also advise that custom in-house tapes, if well-made, are far superior to their commercial counterparts. Remember also that the video camera can be a vital tool in evaluating the quality of your in-house programs.

Training effectively is often best accomplished through the use of training teams but can still be effective coming from one properly chosen person.

Closing Remarks

Ideally, what you’d like to begin to create, or nurture, if you already have it, is an organization which by its culture is focused on learning, that empowers its employees to be active in their pursuit of the necessary training, understanding, and learning with regard to their positions and what they will need to know in the future. Then you will have a library organization capable of effectively responding to an ever-changing work environment.