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

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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 focus 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 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."¹ Training someone to use a piece of software however, in order to be effective, will involve instruction or, as Brandt calls it "conceptual training,"² 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

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motivation for the learning experience. In every training experience, the culture, the philosophy of that organization is communicated through its training. Do each of you know what ideas and concepts constitute the philosophy, the general attitude, the motivating forces of your organization? Most people, including librarians, generally have only the vaguest notion of the forces and ideas that actually move their organization, where their organization fits in the scheme of the greater institution or even the movers and shakers of their work lives. Most of us when we come to a job are handed a pile of handouts, maybe meet with our direct supervisors, if we're incredibly lucky, get job-training, and maybe go to a half-hearted talk on insurance, benefits and the like. We tend to pick up on the culture much the way we did in grade school, especially when moving to a new school. You came in, stood or sat down, were introduced to your classmates and that was it. You started to understand the school culture as you often fumbled and stumbled socially through the semester. For most of us, our introduction into the work-life of our organization was about the same. What an incredible loss of opportunity!! Training is not only about the transfer of skills, but also the meshing of your person to the society of your organization, a place where that person will spend most of their active waking hours. Training programs at your institution, therefore, should reflect the commitment and/or the ambivalence of your institution toward its people, its programs and goals, and its overall self-concept. Training is much too important a task to do in a haphazard manner.

Patti Shank in her article entitled "No Respect? Five foolish things trainers do"³ outlines the five most common pitfalls of training.

First is lack of understanding of the nature of our business. We often approach the training experience, as we said earlier, from a highly focused stance without regard to how that training will fit into the greater scheme of the overall goals and objectives. We need to train someone to use a new online acquisitions system: in comes the company trainer, talks and demos for three or four hours, then out the door to the next session. Wow, that's effective! Most of the time the outside trainer may have a nodding acquaintance with your old system and procedures but just as often, they do not, leaving the supervisor to make that all important connection of what is new to what is currently being done.

The point is that this quick-fix approach to training has generally been viewed as an unproductive and alienating experience. Over the years, I have reached the conclusion that so few commercial training programs are ad-

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, without considerable study, what is required of the actual jobs, the often 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 train-

"Failure is a wonderful teacher ..."

ing. Here, you need a person who can adequately relate and respond to people, someone with an ability to communicate and engage the audience. In many ways, a training session is a performance, a performance with the purpose of leaving knowledge and an open door to greater understanding in the people involved. How many of us have been, in our professional careers, to a presentation or training session where the trainer or presenter clearly knew the subject matter, but just couldn't communicate it or became frustrated with questions and comments and ended up stifling the communication process? Can the trainer communicate not only the technical skills but also a sense of incorporation in the persons involved so they will understand the importance of learning what is being presented? The trainer needs to tell them "what's in it for them." There has been in business for some time a movement to "Train the Trainers;" in short to teach those responsible how to teach, facilitate, and stimulate the learning experience. Most authorities on the subject indicate that this is time and money well spent. After all, if you bring in a consultant or outside firm, it is going to be costly and, like a fireworks show, what will you have once it's over?

Third, we often fail as trainers when we get caught up in faddish training products

that often offer a quick-fix solution to your training needs. As an individual with a background and interest in small business and personnel management, I see almost a constant stream of management gurus parading themselves and their ideas before your attention span. Many have really good ideas, but will those ideas translate to your situation? Will the ideas endure as effective ten years from now? Will implementing this program actually help our organization accomplish its objectives and goals? The point is, beware the quick-fix solution, and if you do implement a policy or program, have a mechanism to evaluate it. Remember that the results of training are not often clear. Were the people trained able to implement the training afterward? 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 not 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 reinstate 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 trainees 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 phenomena, fearing it will eventually lead them to obsolescence. In her article in the January 1999 issue of *HR Magazine*, Lin Gensing-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.⁴ In fact, all levels of an organization must be trained to be able to manage what amounts to organizational change.

Other 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.

Footnotes

¹ "What(How, where, when and why) is training," by D. Scott Brandt. *Computers in Libraries*, vol.19, no.2, Feb. 1999, pp.32-34, p.32.

² Brandt, p33.

³ "No Respect? Five foolish things trainers do," by Edward Shank. *Training and Development*, vol.52, no.8, 1998, 14pp.

⁴ "Training supervisors to manage workers," by Lin Gensing-Pophal. *HR Magazine*, Vol.44, no.1, Jan. 1999, pp.69-72.