SECOND EDITION—
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The Professional Trainer

A Comprehensive Guide to
Planning, Delivering and
Evaluating Training Programs

Robert H. Vaughn

An Excerpt From

The Professional Trainer:
A Comprehensive Guide to Planning, Delivering, and Evaluating Training Programs

by Robert H. Vaughn
Published by Berrett-Koehler Publishers

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Foreword

I am delighted that Bob Vaughn and his publisher, Berrett-Koehler, have asked me to write a foreword to this book. Delighted because the 13 chapters will guide you through the "soup-to-nuts" steps that professional trainers regard as essential to success.

As Professor Vaughn mentions in his Preface, if you're an experienced trainer in the HRD field, you will probably want to read selectively rather than from cover to cover, picking those chapters that best meet your immediate needs. Of course, as readers go you may be the exception rather than the rule: most of today's trainers are relatively new to the field. (Membership in ASTD changes by about one-third every year.)

Who are these new trainers? Many are experienced employees whose skills and proficiency on the job led a senior manager to invite each of them to become a trainer in order to impart these skills and proficiencies to others.

In many organizations the role of trainer is either a part-time responsibility or a full-time job held for one or two years. These trainers then can move on with their chosen career path. (Incidentally, many of these "pro tem" trainers opt to remain in the HRD field and thus launch a new career path!)

We live in an age of innovation. Some 25% of the jobs that exist today were not known as recently as ten years ago. Recently Bill Gates of Microsoft made this statement: "In three years every product we make will be obsolete. The only question is whether we'll make them obsolete or someone else will."

Change requires training, and the rate of change is accelerating at a breathless pace. Do you remember what a slide rule is? A typewriter? Carbon paper? A clothes line? A coffee percolator? A mimeograph machine? A dot matrix printer? To be sure, the one thing that remains constant is change.

A half century ago the image most people had of corporate training included a classroom with an instructor up front, often "good ole Charlie" who had three years to go before retirement.

Not knowing what to do with him, the company made him a trainer. The seating was arranged auditorium style or around U-shaped tables. This arrangement is still appropriate for courses that have a large audience and relatively stable course content that won't change from month to month (e.g., management development, supervisory skills, time management, writing, interviewing job applicants, etc.)

However, rapid changes in technology mean that yesterday's task-specific courses soon became obsolete in today's workplace. As a result:

- more than 90% of today's job skills are now taught on the job rather than in the classroom;
- the instructor is usually a supervisor or experienced employee trying to do a professional job as trainer;
- the group size is small, given today's demand for "just-in-time" training, with one-on-one training being quite common.

Where do you fit in among these options? Will you be teaching in a classroom or on the job? Does your expertise lie in human resources development or in the workplace skills you'll be imparting to your trainees? Are you more comfortable imparting information to a group or coaching and tutoring individuals?

Whatever the case, you want to do the best job you possibly can. You want to be a professional trainer.

Hence this book. Its chapters are chock full of the how-to-do-it guidelines that will give you the confidence and the competence needed to impart new knowledge, skills, and attitudes to your learners. What's more, the writing is well organized and presented in bite-size, easy-to-digest segments that will make your journey an enjoyable one.

The payoff? You'll become quite effective in shaping the behavior of your trainees in ways that you planned and they implemented. And that's what being a professional trainer is all about!

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Scott B. Parry, Ph.D.
Chairman, Training House, Inc.
Member, HRD Hall of Fame

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Preface

As the pace of technology and change increases, organizations are required to train employees, clients, or customers increasingly more often, more efficiently, and at less cost. In today's business world, people are the critical difference, and sometimes the only difference, between organizational success and failure. And training is the primary way to develop the people in your organization.

Almost anyone can be called upon to be a trainer. Some people seem to take to this role quickly and easily, but most approach it with uncertainty or even downright panic. Left to their own devices, most folks try to train others in the same way that they were taught. Yet, there are some major differences in teaching a fifth grader how to write a good sentence, a twenty-five year old how to operate a lathe, and a fifty year old how to sell advertising or write a computer program. We've all had good and bad experiences in learning things, so simply doing unto others what was done unto us is a poor model for effective training.

Who should read this book?

The Professional Trainer is written to help anyone who finds him or herself in the role of training in an organization. This group includes people who are full-time technical or soft-skills trainers, but also the many who do training now and then, as a part of their larger jobs:

- Salespersons and technical experts who must help customers or co-workers learn to use a new process or new equipment.
- Supervisors who must orient and train new hires and help to upgrade the skills of their current employees.
- Co-workers who are asked to help other employees learn tasks that they are currently doing.

- Help-desk employees and other customer service people who help customers, clients, or other employees work through problems in a systematic way.

- Medical personnel, such as nurses or occupational therapists, who must help patients learn to deal with illnesses, medications, rehabilitation exercises, and so on.

- Professionals in any field, such as librarians, athletic coaches, and personal trainers, who work with adults as they develop unfamiliar skills or learn new information.

- Police, fire, and other safety personnel, all of whom undergo extensive and continuing training themselves, and who often are required to give training programs for others, ranging from peers to schoolchildren to senior citizens groups.

- And many more.

People who are brand new to the field of training should find it useful to read through the whole process from beginning to end. So much detail is offered, however, that frequent references to the appropriate sections of the book will be needed as a training program is planned and implemented. Others who have done training before may choose to just read the parts of the book that focus on what they need right now. It can be a valuable reference to provide lists of ideas for brainstorming or implementation.

What will you learn from reading this book?

The Professional Trainer will take you step-by-step through the entire process of organizational training. We begin with some big-picture issues, such as how training is different from teaching at a school and how adults learn differently than children do. Next, we cover the extremely important concept of making sure that the training really meets the needs of the employee and the organization. There's no value in training people on things that the organization doesn't require, nor in training them on things that they already know or can do. Once you know what people need to learn, the book will take you through the steps of planning and designing the training, designing measures of the training, choosing the best way to approach it, choosing and designing media and facilities to support it, actually delivering the training, and finding out whether or not it worked.

This book can be used as a text for a train-the-trainer program, but also as a personal handbook for anyone who manages

or conducts training. The suggestions should work equally well for large or small organizations, and in for-profit companies as well as government or social agencies. Often, you won't need to develop a training program from start to finish. Perhaps you will be doing just a small part of a lesson or are looking to improve an already existing training program. *The Professional Trainer* can help you with these tasks, too, because the individual chapters largely stand on their own. Maybe you just need ideas on, say, how to get a group more involved in discussion, or ways to encourage trainees to actually take their skills back to the job and use them. This book is an excellent reference to keep on your shelf, to consult when you need a troubleshooting guide.

What's different about this book?

Most books about training focus on a single subject in the process, and many are written with more emphasis on an "academic," rather than practical, approach. *The Professional Trainer* is a basic primer that covers the entire process, yet it still includes plenty of detail to support the novice trainer. Even somewhat experienced trainers will be pleased with a number of useful checklists and different approaches. Each topic covered also has references to other, more detailed sources of information, if the reader wishes to delve more deeply into a topic. Some of the particularly helpful topics include:

- An overview of the field of training, including a list of what trainers actually do, plus some useful websites where you can get further information (Chapter 1).
- A list of ways to help make the learning experience more attractive and effective for adults (Chapter 2).
- A nine-step process for figuring out what skills and knowledge must be included in a training program, and a list of tools to help refine those concepts (Chapter 3).
- A brainstorming checklist to help create an effective proposal for a training program (Chapter 4).
- Techniques for understanding how to structure training objectives in a way that leads to appropriate levels of training to meet organizational needs (Chapter 5).
- Logical pro and con checklists for different types of learning evaluation (Chapter 6) and a variety of different training delivery techniques (Chapter 7).

- Several checklists to help make appropriate business decisions about technology-based training (Chapter 8).
- Specific suggestions for when and how to use a variety of media support techniques (Chapter 9).
- A guide on how to develop practical and useful training plans, including a checklist for on-the-job training plans (Chapter 10).
- Suggestions on a variety of ways to involve individuals and effectively use small groups, as well as many other ideas useful during the delivery stage of training programs (Chapter 11).
- A step-by-step training program-assessment process, which includes a model, to determine whether the training was done efficiently and effectively (Chapter 12).
- A look into the future of training, including what sorts of changes and challenges can be expected for the field (Chapter 13).
- And many more ideas, models, checklists, and references throughout.

This book also includes a few ideas that you won't find in other books on the subject, such as a comparison of the traditional training model of four levels of objectives to the more academic style model of Bloom's Taxonomy. Also unique to this book are the Training Styles Grid, the Cost Model for Technology-based Training, and other features.

What perspective does the author bring to this book?

As someone who has taught train-the-trainer programs for more than two decades, this book reflects my ideals of what it takes to succeed in this interesting career. It has a good breadth of coverage and a reasonable depth of coverage in the various activities that make up the role of an organizational trainer. It's appropriately referenced but not overly academic. It includes factual, procedural, and conceptual information in a form that is accessible and useful on the job.

Writing, editing, and publishing a book such as this one is no small commitment in time for the author and in money and effort for the editor and publisher. I appreciate, especially, the work of my developmental editor Roger Williams, who saw some

merit in this approach and has been helpful in a number of ways in bringing this book to life. A number of helpful suggestions came from the four reviewers, and my thanks goes out to them. My colleague Corrie Bergeron was quite helpful in helping me deal with many of the concepts of the technology-based training. I also gratefully acknowledge the support and many useful suggestions of my wife Susan, also a trainer and educator, who brought a technical training viewpoint to this work. The people at Berrett-Koehler have been a delight to work with in making this book a reality. Finally, I acknowledge the many suggestions from over 1,000 former students and trainees who used the first edition of this book and its predecessor forms as they learned about the business of training. All good trainers learn from their students.

Robert H. Vaughn
Mentor, Ohio
May, 2005

1 The Training Field

"Corporate America is now built on intellectual capital rather than bricks and mortar—and that's changing everything."

—Thomas A. Stewart

Being a professional implies that an individual is aware of the history, vocabulary, major theories, tools and techniques, publications, organizations, key individuals, current trends, and ethical considerations related to a given field. This book provides the foundation on which the reader can build toward becoming a professional trainer.

■ ■ ■

An organization's success will depend on its ability to compete, often within a global economy. Coping with today's market changes requires organizations to take a variety of actions: They are merging. They are internationalizing. They are downsizing. They are becoming more flexible in a variety of areas, as exemplified by the flexibility in work arrangements, dress codes, and work hours. Organizations are also investing more in training. Human skills are frequently the most important resource an organization has to offer. All other resources are transferable or easily copied by competitors, but the individual is unique, and *training* is the key to making the best use of individual skills.

The role of the organizational trainer is gaining more importance on a daily basis. The chapter-opening quote from Thomas A. Stewart, an author and member of *Fortune* magazine's editorial board, highlights that change. How big is the training business, and how is it likely to change? What do trainers do, and what should they be doing? This chapter will help put the important

and growing role of training into perspective and prepare the reader for the remaining chapters.

What, exactly, is training?

Defining some key terms seems an appropriate place to begin. What is training, and how is it different from development or education?

Training is providing information and direction in a planned and structured manner to employees on how to accomplish specific tasks related to organizational needs and objectives. Training should lead to permanent behavioral change and measurable improvement in job performance. *Training may also be provided to customers or clients, but the same principles apply. Therefore, this book will simplify the phrasing by just using the term "employees" throughout to refer to trainees of any category.*

One way of categorizing the content offered by training is to divide it into three sub-categories: factual, procedural, and conceptual content.

Factual content is pure data and information. Examples of factual content are the price of an item sold by the company, the name of the department manager, the location of the fire extinguisher, or the version number of the software used by the accounting department.

Procedural content provides detailed information about how to do things. Examples of procedural content include the steps required to enter and complete a sales transaction, operate the copy machine, approach a customer in the lobby, or set up the CNC machine to produce a component for the valves the company makes.

Conceptual content includes information about the "why" as well as the "how." An example is a training session that explains that cash received at the register should not be put into the drawer until the change is counted out, so no disagreement can arise as to what amount the customer handed to the cashier. Adults learn better and remember facts more easily when they have a context in which to structure that information. Knowing the reason behind laying the cash received on the top of the register will actually help them to learn to do it.

Training in business and other organizations is often sub-categorized into three levels: ***orientation, skill training, and development***.

Orientation is training that relates to providing the information (knowledge, but not usually skills) necessary to function

within an organizational setting. It is usually done with new hires immediately or shortly after they start working for the organization. Typical orientation content includes the history and structure of the organization and its position in its industry, work rules and procedures, benefits, and other essential information such as the location of the rest rooms and fire extinguishers and the procedure by which the employee gets paid. Orientation in some form must be done by all organizations. Some will delegate it to each supervisor, while others will centralize it, often in the Human Resources department.

Skill training provides information, including both knowledge and skills necessary to perform the work for which the individual was hired. When a skilled worker is hired, this type of training is usually not required, or is required to a lesser degree than with an unskilled new hire. The skilled hire may simply need to learn this organization's way of doing something they have done before. Certain other skill training may also be relevant to all new hires, such as how to use the phone system or fill out administrative forms. This training may be done during the orientation, even though it includes simple cognitive or physical skills.

Development prepares employees for advancement in their jobs, the organization as a whole, or (sometimes) for personal growth. It may include formal within-company training, other experiences such as job rotation, or even tuition rebates for attending relevant external programs. Developmental activity is not generally tied to specific positions in an organization but relates to broader skills and concepts necessary for growth within the organization.

Note that all these categories of training relate to needs of the organization, and not to needs of a broader society. **Education**, unlike training, provides information and guidance in an organized manner about concepts and knowledge, both general and specific, of all kinds. Education includes offerings by public and private schools, as well as by some organizations and corporations. Education is essential to functioning in society as well as in specific organizations, and—in a strict learning sense—will lead to a relatively permanent change in behavior.

Some of the topics covered in this book also apply to education and development, but the main focus is on training. The reader should emerge with a basic but thorough understanding of the process and vocabulary related to training within an organization.

Table 1-1 compares some of the key differences between learning in an academic setting and receiving training in an organization.

Table 1-1 Some Differences between Academic Learning and Organizational Training

FACTOR	ACADEMIC LEARNING	ORGANIZATIONAL TRAINING
Trainer Credentials	Academic—often only academic. Some colleges, especially two-year and teaching schools, also consider work experience and skills in interpersonal communications.	Skill or knowledge in relevant subject regardless of academic achievement; also, skill in interpersonal communications is more critical.
Course Content	Usually broad and theo-retical. Certain fields, such as computer studies, may also have practical element.	Focused and application oriented. Deals mostly with facts and procedures, only rarely with concepts.
Objective Levels	The most common are knowledge-based and occasionally skill-based objectives. Job perfor-mance objectives are usually only peripheral issues.	Although training often includes knowledge and skill-level objectives, job performance is the outcome of most concern.
Time Basis	Usually lock-step and tied to a semester or quarter system.	Typically short-term; more self-paced; new groups start as needed.
Grading System	"A" through "F."	Usually pass-fail; many programs are not graded at all. Some are proficiency-based.
Common Presentation Style	Lecture and other inductive forms, though cases and lab applications are becoming more common.	Often uses participative experiences, even in a classroom form; a hands-on format is most common for on-the-job training.
Reason for Participation	To obtain a degree, certificate, or other credential. Sometimes for self-satisfaction, but probably for career and employment reasons.	Required by employer in order to support the organization's needs. May be a condition of keeping a job or getting a promotion.

Table 1-1   Some Differences between Academic Learning and Organizational Training (*Continued*)

FACTOR	ACADEMIC LEARNING	ORGANIZATIONAL TRAINING
Student Unit	Individual; working together is considered cheating for most types of assignments. "Client" is individual student.	Group learning is much more common. "Client" is the organization in which the trainee works.
Training Materials	Comprehensive text-books and outside research materials.	Company materials and trainer-designed materials. Only rarely are books used.

What do trainers really do?

The typical training job requires an individual who understands the skills and knowledge being taught and who has effective inter-personal communication skills. Most trainers will also need to understand how to design training, use various kinds of media, and measure the results of training. Some will also be required to determine training needs through job analysis and evaluation of employee skill levels. Obviously, the job of training can include a wide spectrum of basic skills.

According to a recent report by **ASTD** (formerly the American Society for Training and Development), these are the major areas of expertise needed by trainers[1]:

- Career planning and talent management
- Coaching
- Managing organizational knowledge
- Managing the learning function
- Facilitating organizational change
- Measuring and evaluating
- Delivering training
- Improving human performance
- Designing learning

To develop those areas of expertise, the professional trainer needs to build on a foundation of personal, interpersonal, and business

and management competencies. Finally, the professional trainer may be called upon to serve the roles of project manager, professional specialist, learning strategist, and business partner. To see the entire model, go to www.mymodel.astd.org, or see *The ASTD 2004 Competency Study: Mapping the Future.*[2]

Does a trainer really have to be able to do all those things? In a small organization with only one or two trainers, they may indeed be responsible for most of those activities. In a large organization, the labor will be divided, and trainers will specialize, each needing only some of the competencies listed above.

What should trainers do?

A better question than what trainers do might be, what *should* trainers do? An ASTD Leadership Conference report[3] stressed that *trainers should spend their time on the activities that create the most value for businesses*. These activities include:

- Linking training to the results that business units are expected to achieve.
- Designing and developing new training programs to address emerging business needs.
- Conducting training programs.
- Selecting and managing training suppliers.
- Handling logistics and administration of training.
- Measuring the effectiveness of training.

A serious misalignment exists between what senior executives say is value added and what Training and Development people do day-to-day. As Table 1-2 illustrates, most executives believe that trainers should work much more on linking business needs to training and measuring the results of training in terms of its effect on the business' bottom line. The table compares the importance that executives assign to various training activities with the time actually spent on those activities. It ranks each item on a scale of zero to four, with four being the most important effort and most common use of time. The discrepancy column shows how far the reality is from the executives' desires.

The implications are clear: trainers spend too much time in the "administrivia" of their jobs, and not enough time working with managers and the larger organization to make sure the training actually provides something of value.

Table 1-2   Executives' versus Trainers' Views on How Trainers' Time Should be Spent

ACTIVITY	SENIOR EXECUTIVES' DESIRED LEVEL OF EFFORT	TRAINING STAFF'S ACTUAL ALLOCATION OF TIME	DISCREPANCY	CONCLUSION ABOUT TIME SPENT BY TRAINERS IN THIS ACTIVITY
Business Linkage	4.0	0.4	–3.6	Way too little time
Training Design	2.6	2.6	0.0	About right
Development Activities	1.0	3.9	2.9	Way too much time
Training Delivery	2.6	3.9	1.3	Too much time
Sourcing (Finding external information and providers)	1.4	1.5	0.1	About right
Registration and Administration	0.4	4.0	3.6	Way too much time
Measurement	4.0	0.5	–3.5	Way too little time

Scale: 0 = least important, should be allotted least time; 4 = most important, should be allotted most time

Source: Basic chart from ASTD, with explanatory column added for this book.[4]

How large is the training industry?

U. S. business and industry surpassed $51 billion in direct-cost spending on formal employee training in 2004.[5] This figure does not include the huge cost of personal or government spending on work-related training or the costs of elementary and secondary schools and college education. Academic learning, of course, often leads young adults to their first employment opportunity, and work-related training can garner older adults substantial job upgrades or career changes. In 2002, companies in the U.S. spent, on average, less than 2% of payroll, or only about $649 per eligible employee. By comparison, China spent 3.2% of payroll, Asia (excluding China) 3.8%, and Europe 2.5%.[6] Other factors, of course, influence these figures, and not all U.S. companies spend equal amounts. For example, in recent years IBM reportedly spent over 5% of payroll on training, Fidelity First and Xerox over 4%, and Federal Express over 3%. Conversely, some companies have no training budget at all.

The question of "How much training is enough?" is difficult to answer and will vary from one industry to the next. The U. S. is well below average among industrialized nations in per capita expenditures on training. Tony Carnevale, an author and former economist for ASTD, says that U.S. training expenditures are weak, both because we do too little of it and because we do it for too few people.[7] In terms of what kinds of training are offered, the 2003 ASTD survey of 276 training "benchmark" organizations[8] reports that the most common topic for training is technical processes and procedures, followed by information technology skills.

Most organizational training still happens on the job and informally. For off-the-job business training, 85% of all companies use traditional classroom-based training "often" or "always," with only 3% reporting "never," based on *Training* magazine's 2004 survey. **Technology-based training**, however, is the fastest-growing category, with considerable increases in recent years. It now accounts for over 25% of all training done in organizations, and 26% of organizations report having a separate technology-based training budget.[9] Classroom trainers will need presentation and delivery skills, though exactly how they present and deliver will vary from one situation to another. Trainers who are involved with distance learning or technology-based training will need a different set of skills from those who meet in person with the trainees. These topics are covered in much more depth in Chapters 8 and 9.

What are the various organizational options for providing training?

Training serves two broad categories of employees: current employees and new hires. With the newly hired, there may be a basic option of hiring them already trained—thereby requiring only an orientation—or hiring them untrained. For either category of employees who need skill training, several other basic choices are required. The first choice is whether to conduct training on the job or off the job. If the choice is off the job, the options then become to do it inside the company or to arrange for outside training. Figure 1-1 shows the basic tree of choices.

Each of these choices has certain advantages and disadvantages. Hiring someone already trained means that they can start to work immediately after orientation. The organization gets immediate productivity and eliminates training costs. The new hires may also add a fresh perspective on how the organization accomplishes a technical task. On the other hand, trained individuals will be more expensive than untrained ones to hire, and they may bring bad habits or methods that don't fit the organization's needs or culture. Untrained people come with a clean slate and can learn how to do everything through training. Organizations may also get some financial incentives from certain government, union, or industry sources to hire unskilled workers. And, in fact, they may be the only choice in certain industries if no trained people are available, either because the skills needed are new or in very high demand.

Figure 1-1   Basic Training Choices for New Hires
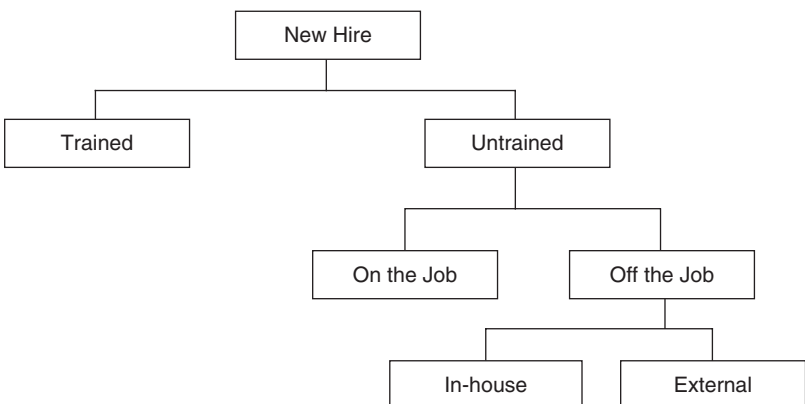
If an untrained person is hired, the organization must choose whether to conduct the training ***on the job*** (***OTJ***) or ***off*** the job. On-the-job training is by far the most common for new hires in business and industry, and it is further discussed in Chapter 7 and others. The company immediately gains at least some productivity from the new hire and minimizes any ***transfer of training*** problems. Transfer of training problems result when an employee is trained a specific way in a classroom or other training environment, then asked to perform in a real-world environment that does not match the classroom. An example is training workers using Windows XP® in the classroom, then sending them to a job where Windows 98® is still in use.

On the other hand, new employees may be very slow during early on-the-job training and perhaps even pose a hazard to themselves and others. They detract from co-workers' or supervisors' productivity while they are being trained. They may pick up bad habits and may not get to see all parts of the job. The training is not likely to be systematic or effectively evaluated. Off-the-job training, however, requires setting up a separate learning station and using a trainer. Both of these approaches are costly and mean that the worker won't be productive at all during training. Off-the-job training, though, is likely to be much more systematic and focused; thus, it is often more efficient. Many times companies will use a combination of the two techniques in order to gain the benefits of both.

If the decision to train off the job has been made, the question of whether to train inside or outside the organization must be answered next. In-house training offers the major benefit of ensuring the training is relevant to the organization. As mentioned, however, it may be more expensive. The organization must support designing a curriculum, setting up a training facility, and hiring a trainer or borrowing a good worker or supervisor and training him or her to be a trainer. If hiring a company nurse as a new employee, for example, an organization certainly won't opt for this method. External training can come in many forms, all of which share one obvious disadvantage: they're not in-house. The trainer may not know the company, the equipment may not match the company's, the organization has limited control over curriculum, and—in general—transfer of training problems are exacerbated. Conversely, the trainer may be very good and the content very relevant. Much depends on the source of the training and that source's track record with the organization that needs the training. Figure 1-2 shows one manner of modeling these options.

Figure 1-2   Differences among Training Options

High

College
Courses

Well designed O-J-T

Off-Site
Training

Job
Rotation

Special
Projects

Structure in Training

Mentoring

Groups and
Professional Associations

Poorly designed O-J-T

Low

Organization Involvement

High

This figure shows a comparison of several training methods as they relate to the control or involvement of the organization in their design and presentation, and the degree to which the training is structured. College courses are typically highly structured, but an outside organization usually has no input at all regarding their content. On-the-job-training can be highly structured (or not, if it's poorly designed), and the organization has a high degree of input to that design—in fact, it controls it completely.

How is training delivered within the organization?

One way of categorizing training delivery within an organization is that it can be delivered in a fragmented, formalized, or focused manner.

The first, *fragmented training delivery*, describes an environment in which no clear link to organizational goals is evident. In this situation, training is often perceived as a luxury or a reward, the emphasis is usually on knowledge-based courses, training is done exclusively by trainers or outside vendors, and the training needs are not assessed. Trainees may sign themselves up or be signed up by their supervisors from a list of available courses being offered.

In *formalized training delivery*, there is an effort to link training to human resource needs. Skill-based courses are emphasized, and pre- and post-course activities are commonly used to

facilitate the transfer of learning back to the job. Managers may appraise the training in addition to the trainees.

A ***focused training delivery*** environment exists in what is called "the learning organization." Training is perceived as necessary for survival. It is linked to organizational strategy and individual goals. The main responsibility for training rests with line management, and accurately measuring the effectiveness of training is important. Pre- and post-course objective tests and other quantitative techniques are used in this environment.

Training can be managed and provided from a variety of different locations in the organizational hierarchy. In a large organization, the training department is often housed as part of the Human Resources operation. In some large companies, though, it is decentralized and apportioned into the various departments that use it. Smaller companies may have no one directly responsible for training. Instead, on-the-job training is left to the supervisors, and any other formal training that must happen is contracted out.

External training may be provided by consultants, colleges, trade schools, correspondence schools, vendors, suppliers, industry associations, and a host of other sources. The problem for the organization becomes one of finding and selecting from among viable options. *Training* magazine's 2004 Industry Report shows that 26 % of traditional training programs and 31 % of technology-based training are delivered by outside contractors, and even more—35 % and 41 %, respectively—is *designed* by outside contractors.[10] Historically, training has been seen as a staff responsibility, but the trend is for line managers to be more involved—sometimes even doing the training themselves.

How is training viewed by top management?

The opening quote for this chapter from *Fortune* magazine and other evidence illustrate that training is becoming a more important factor in business today than it has been previously. For example, a two-year measurement of stock performance indices was run in the late 1990s, comparing the stock value of companies heavily involved in training and development to the Standard and Poor's 500 index at large.[11] During this time, the value of the S & P rose 68 %, while the value of companies investing heavily in training and development rose 229 %. Of course, confounding or external factors (e.g., the performance of the technology industries, which are heavily invested in training) may have skewed

these results, but the point remains that organizations that focus on training generally do better than those that don't.

Look for the influence of training to increase substantially in the near future. How much of an increase is difficult to predict, since the nature of training will change both because of the technology used in training and because of the need for technology training within the organization.

How does the organizational environment influence training?

The organizational environment influences training in literally hundreds of ways. It determines how much training is offered, where it is offered, who does it, who gets it, how much support management gives it, and whether the trainees support it.

How much training is offered to employees depends on a number of organizational factors. A company operating in an industry that changes quickly and is heavily invested in high technology probably needs more training than others do. If employee turnover is high, orientation training, at least, will be needed frequently. Whether skills training is needed will depend on hiring practices. Another obvious factor is the organizational budget. If cash supplies are short, training is often one of the first things to go, though this measure may be a false economy. More will be said on that subject later in the book.

Where the training is done can be influenced by management attitudes, the number of trainees at any given time, the organizational resources available to support training, and many other factors. If the company has just one or two people at a time who need training, it may well be done on the job or by sending people to an outside source, such as the manufacturer of the equipment that they need to be trained to use. If many need to be trained, training will more likely be done in-house or by contract.

Who will do the training depends, first of all, on whether people who have the technical skills (and ideally instructional skills as well) are available within the company. If not, training will be done by outsiders. A supervisor or skilled employee, if available, can be chosen to do training, or a professional trainer can be employed. This decision is further influenced by the complexity of the knowledge or skills being taught.

Who gets the training is influenced by such factors as how management feels about training, where problems exist or changes are occurring, how important status levels are in the organization,

and so on. This mix of factors is sometimes referred to as part of the organization's *culture*. (See Schein[12] and others on this topic.) Training may be seen as something that everyone needs, or something that is a "perk" (perquisite) reserved for higher-level employees or just certain groups. It may go only to those who ask.

Management support for training is influenced by a myriad of factors, most importantly the budget and whether or not the training department is credible. If top management supports training, or if the experience of people who have been trained is good, probably more training will be done in the organization. Management will also be swayed by their own predilections, other things that are going on that require their attention, and so on.

Finally, *trainee support* has to do with whether the trainees see training as a useful, interesting experience, a total waste of time, or something in between. The attitude people have as they arrive for training is often contagious. Usually if the boss sees it as important, so will the employees, but this perception depends on their own background and experiences. Frankly, most adults find classrooms threatening, and adult learners may require lots of motivation and appropriate conditions for good learning.

How can these influences be controlled?

Most of these influences can't be completely controlled, of course. The most basic ways to deal with the organizational environment are for the trainer to work closely with the organization's management and to do the best possible job in designing and presenting effective training programs. Many of the suggestions throughout this book will help the trainer to design the best possible proposals and do all that can be done to ensure that training is effectively presented and applied in such a manner as to benefit the organization and develop trainees' skills and knowledge.

It also may be useful to enlist the aid of a professional *OD* (organizational development) person or consultant who can help support training or the training department in the areas that are outside the trainers' expertise. In the world of professional management, change is everyone's responsibility, but designing and implementing organizational change is a specialty of the professionals in the organizational development field.[13] OD is concerned with the "big picture" of how organizations operate, including such aspects as their formal structure, culture, communication patterns, and so on. For training to be effective, it must be designed to teach the right people to do the necessary jobs, allowing

for the organization's method of operation. This requirement means that a great deal of training must be designed and delivered with a clear understanding of the organization's structure and its visible and invisible (unarticulated) culture.

Factual and procedural training (as opposed to conceptual) can be accomplished without excessive emphasis on organizational culture. Unquestionably, much of training is and should be at the factual and procedural levels. If the conceptual level is ignored completely, however, training will produce employees who know how to handle everything except a new situation. Without conceptual training, employees do not understand the larger context of what they're doing. The result is employees who tend to operate mechanistically. This outcome is not good for any business, and certainly not good for a growing business. It means a more frequent need for retraining, much more supervision required for the employees, and—ultimately—frustrated customers. Yet, the conceptual level is often resisted the most by managers, who may characterize it as giving the employees more than they need to know and keeping them away from productive work.

It is this need to understand how the organization operates that pushes the trainer to be involved in OD-type activities. Such involvement is particularly relevant for the trainer who also designs the training she or he is delivering. The chapters that follow attempt, in general, to deal with all three levels of training: factual, procedural, and conceptual, and to suggest ways in which the trainer can work within the larger organization.

Where can I learn more about the training field?

The premier professional association in the field is **ASTD**, formerly named the American Society for Training and Development. The name changed to simply its initial letters several years ago in recognition of a large and growing percentage of membership outside of the U.S. ASTD is headquartered in the Washington, D.C. area and has over 70,000 members worldwide, many of whom belong to the 140 or so local chapters around the U.S. ASTD welcomes anyone working in positions related to the training field, including vendors, consultants, training managers, media specialists, and trainers in any subject. ASTD provides such member services as the monthly *T+D* magazine (Formerly *Training and Development*), several other quarterly or monthly newsletters and special interest publications, research studies, conferences, a national events presence, a wide variety of training books, and so on.

Another long-time and highly regarded training-related professional association is the ***International Society for Performance Improvement***. ISPI members also include persons who are interested in non-training approaches to performance improvement. Like ASTD, ISPI is also headquartered in the Washington area and has numerous local chapters.

Many other professional associations and publications exist, which serve the needs of more narrowly focused trainer groups. Professional organizations with a broad focus, such as the American Management Association, the Society for Human Resource Management, and so on, often have subgroups or special-interest groups of trainers within the larger group.

The primary periodical in the field is *Training* magazine. This magazine is quite readable, widely available, and covers just about all aspects of training. A number of other monthly or quarterly publications come from various professional training associations (Box 1-1), or from other sources such as private or commercial publishers. Certain book publishers also specialize in training-related materials. Box 1-1 provides a list of major training-related resources, including publishers, professional organizations, and websites.

Box 1-1   Selected Professional Resources for the Training Field

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Note: The field of training is much too large and diverse to give a comprehensive list, so these listings focus on major companies in the business. As most web users know, links from one source will lead you to others, and web searches can be constructed to find specific areas of interest. This information was correct at the time of publication, but is certainly subject to change.

Training-related professional associations:

ASTD (Formerly The American Society for Training and
    Development)
    1640 King Street Box 1443
    Alexandria, VA 22313-2043
    800.628.2783
    www.astd.org

Box 1-1   Selected Professional Resources for the Training Field (*Continued*)

International Society for Performance Improvement
    1400 Spring Street Suite 260
    Silver Spring, MD 20910
    301.587.8570
    www.ispi.org

Society for Human Resource Management
    1800 Duke St.
    Alexandria, VA 22314
    800.283.7476
    www.shrm.org

Society for Industrial and Organizational Psychology
    PO Box 87
    520 Ordway Ave
    Bowling Green, OH 43402-0032
    419.353.0032
    www.siop.org

Selected Training-related publications:

Training magazine
    www.trainingmag.com

T+D magazine (Published monthly by ASTD)
    www.astd.org

Performance Improvement (Journal Published monthly by ISPI)
    www.ispi.org

Learning & Training Innovations magazine (formerly *e-learning*) deals mainly with e-learning topics
    www.LTImagazine.com

Presentations magazine deals with inductive training techniques (lecture) and equipment to support them
    www.presentations.com

Chief Learning Officer magazine is targeted to the senior training persons in an organization
    www.clomedia.com

**Box 1-1   Selected Professional Resources
for the Training Field (*Continued*)**

Berrett-Koehler Publishers
    Business related books, including many on training
    235 Montgomery, Suite 650
    San Francisco, CA 94104-2916
    800.929.2929
    www.bkconnection.com

Other training related websites:

Tooling University (as discussed in Chapter 8)
    On-line classes in manufacturing technology
    15700 South Waterloo Road
    Cleveland, Ohio 44110
    866.706.8665
    www.toolingu.com

Lakeland Community College
    Regionally accredited Credit and Non-credit
    Train-the-trainer on-line courses
    7700 Clocktower Drive
    Kirtland, OH 44094
    440.525.7100
    www.lakelandcc.edu

The Trainer's Warehouse
    Books, supplies, toys, etc.
    89 Washington Ave.
    Natick, MA 01760
    800.299.3770
    www.trainerswarehouse.com

Information on corporate universities can be found at
    www.corpu.com

Information of web-based training can be found at
    www.webbasedtraining.com

Information on adult learning and cognitive skills can be found at
    www.learnativity.com

Information on one of the several web-based learning platforms
    can be found at www.blackboard.com

One of the largest train-the-trainer companies can be found at
    www.langevin.com

this material has been excerpted from

The Professional Trainer:
A Comprehensive Guide to Planning, Delivering, and Evaluating Training Programs

by Robert H. Vaughn
Published by Berrett-Koehler Publishers
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For more information, or to purchase the book,
please visit our website
www.bkconnection.com