As Paula Ketter writes in her editor’s note in the April 2016 issue of TD magazine, “SMEs can be very beneficial to training. They are the experts and they bring experience, perspective, and credibility to a learning process. But all can be lost if they are not supported in the training process.”

Relationships between talent development professionals and subject matter experts are not always smooth sailing. In their issue of TD at Work, Sarah Wakefield and Patty Murdock write, “Chances are you have some stories to tell about great SMEs and those who were a bit difficult.” It may be challenging, but making these relationships as positive as possible can be critical to successful training.

In this TD at Work collection, we provide guidance and tools to help instructional designers and trainers collaborate with SMEs, from deciding which SME to enlist on your project (if you’re lucky enough to have a choice!), to giving the relationship a boost by thinking about your own personality and way of doing business. Because the relationship is a two-way partnership, the project may entail adapting your own style to reach success.

What is the best way to use your SME? Will your SME facilitate a session? Will you incorporate the SME’s knowledge into your own training session? This collection outlines advantages and disadvantages to various training delivery methods should your SME be conducting the training. If you’re leading the training using the SME’s knowledge, how often and by what means will you communicate?

One aspect to the relationship between learning development professionals and SMEs that can be a cause of strain is lack of mutual respect for what each brings to the table. You might assuage some of these problems by sharing your credentials and competencies with the expert. How many SMEs know the importance of—and how to create—a nurturing learning environment? Has your SME thought about developing learning objectives? Showcasing the complexity of training and knowledge retention by providing this type of information should help your SME see trainers and designers in a new light.

Finally, if your SMEs are developing materials for the course or facilitating a session, give them the tools for success. The final three issues in this collection are ones that you can share with SMEs to help them step into your shoes and ace a training session.
SECRETS TO SUCCESSFUL SME PROJECTS

THREE MAIN PROJECT PHASES ............................................ 7
BEFORE THE PROJECT .................................................... 7
DURING THE PROJECT ..................................................... 15
AFTER THE PROJECT ....................................................... 19
CONCLUSION ................................................................. 22

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REFERENCES & RESOURCES ............................................. 23

JOB AIDS

Risk Mitigation Chart ...................................................... 24
Rapid Prototyping vs. Detailed Drafting ....................... 25

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Dealing with subject matter experts (SMEs) is one of the most important competencies of a technical developer. This competency is essential, but it can be challenging. A successful developer is able to produce results within this sometimes frustrating relationship.

If you're reading this issue, chances are you have some stories to tell about great SMEs and those who were a bit difficult. Let's be honest here: We can't do our jobs without our SMEs, but we all want to know how to make it easier to work with our SMEs. What if the secret is in how you approach them before, during, and after the project?

We believe the key to working with SMEs is in how you prepare for each of these three project stages and how you apply the information you have at your fingertips. This issue will provide you with strategies for communicating with different SMEs throughout the life cycle of a development project.

In this issue of TD at Work, you will learn:
- the three main phases of your collaboration with SMEs
- the types of SME personalities best suited to different types of projects
- how best to work with SMEs during each phase of the project: before, during, and after
- what to do when things don't go according to plan.

THREE MAIN PROJECT PHASES

Think about the three main phases of the project: before, during, and after. Sometimes, they might look like this:

Before
- You have one month's to one day's notice that a project is coming your way.
- You enter into a stakeholder meeting knowing zero about the project or people involved.
- You have some information on the project, but everyone seems to think your role is instructional designer, graphic artist, and SME—all rolled into one convenient person.

During
- Missed deadlines reign above almost all other challenges.
- The SME doesn't seem to have time to devote to project development.
- The SME has decided he needs five to eight people to review each development step of the project, which confuses the objectives, fragments the work, and stretches the time required.

After
- The debrief meeting to discuss project challenges, areas of improvement, and successes just doesn't seem to happen.
- The debrief meeting happens but is a gripe session.
- There is no opportunity to ask for referrals within the organization or future work if you are a contractor or consultant.

We are here to help you manage and change these typical scenarios. Using a few tips and processes, you can change the outcomes during all three phases. Let's look first at the stage before the project.

BEFORE THE PROJECT

Before development officially begins, you will undertake some important tasks, including choosing a subject matter expert (SME), holding a kickoff meeting, and writing a scope of work statement.

Choosing a SME
Deciding which SMEs will be assigned to a project is an important decision. This can impact the success and eventual duration of a project. (It also can impact the mental health of a developer!) The book Technical Training Basics explains that a good SME:
SME PROFILES: WHO WOULD YOU PICK AND WHY?

Three SME profiles we see a lot are what we call Busy Betty, Skeptical Sam, and Overly Complex Olive. We will describe them and explain which SME we would pick for three separate project types: immediate need, multiple SMEs, long term.

- **Busy Betty** cannot say “no.” She wants to help, but she has spread herself so thin that she is not helpful to the process. When you ask Betty questions, she is typically performing another task and not giving you her full attention.

- **Skeptical Sam** had a negative experience with training and now needs to be coaxed into cooperation. Sam is notorious for answering a question with a question.

- **Overly Complex Olive** has been an engineer for so long that she has forgotten how to discuss a topic in simple terms. Olive is notorious for setting records for long answers using the most complicated words available.

We recommend working with **Busy Betty** for projects that must happen now, right now. You might think she is too busy, but truly, she brings these skill sets with her for development:

- organizational skills
- speed
- laser focus when face-to-face.

The ability to organize and multitask, plus the speed needed to produce now will appeal to Betty’s capabilities. The implied importance of the learning project will be a positive for her. Always, always work with this SME type in a face-to-face environment. If you must use a communications platform, be certain you have video capability or Busy Betty will be instant messaging a colleague during your development meetings while also possibly walking the dog or taking a jog in the park.

**Skeptical Sam** is a great choice for projects with multiple reviewers. He can be your point person to manage them and bring the content back to you fully validated and ready for instructional design strategies. We see Skeptical Sam as having these main qualities:

- forcing a defense to added content
- detail orientation
- career-long support for those he has worked well with.

Skeptical Sam will insist that a reviewer defend each content change, which will probably decrease late-stage revisions. Sam also brings an eye for detail to the project; otherwise, he would not be able to answer each question with another question. Convince him that he can come out a winner from working on this project and truly listen to his knowledge. Skepticism can fade into complete support once this SME understands the value you bring to the learning domain.

At first thought, it might seem strange to you, but **Overly Complex Olive** will work best on a long-term project and as a solitary SME. These qualities are her main contributions:

- complete command of the topic and a love of sharing knowledge
- enjoyment of linear concepts of charting and graphing
- preference for working alone.

A long-term project will suit Olive’s need to communicate complicated concepts in great detail. She wants to share her knowledge, but she may not work well with multiple SMEs. She will appreciate high-profile projects and understand their importance. We suggest long-term projects because the time she dedicates to the content will be lengthy—but needed for a large project. Work with her long enough, and she eventually, with your help, will simplify her language.
DESIGNER-SME COLLABORATION

THE DESIGNER-SME RELATIONSHIP .................................................. 29
THE THREE Cs .............................................................................. 33
REFERENCES & RESOURCES ............................................................ 42

JOB AID
Your Collaboration Roadmap ............................................................... 43
Are You Ready for Collaboration? ....................................................... 44

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As a talent development professional—whether you are a trainer, e-learning developer, coach, or training manager—you will likely create instructional content and temporarily adopt the role of an instructional designer at some point. Many TD experts, including those tasked with instructional design, will experience their initial occupational rite of passage in their first interaction with a subject matter expert (SME).

Traditionally, this interaction is a recurring process involving the critique and correction of the SME’s training materials by the instructional designer (or another TD pro), which the SME in turn reviews for technical accuracy, and the designer then finalizes. Often because of conflicting values and standards, deadlines, departmental animosities, and other factors, what should be a cooperative professional partnership often falls short.

Although the training product may be effective and delivered on time, there is often a cost to personal morale that is never measured and seldom corrected. As a result, many designer/SME partnerships fall short of their potential. What should be a fruitful collaboration instead defaults into a competitive cycle in which the survival of the fittest prevails. Those who are not as adept at handling the constant pressures of deadlines, criticisms (often unwarranted), pushbacks, misunderstandings, and other unpleasantries do not produce at their potential—and may eventually drop out of the field entirely. Because many designers are already struggling to stay on top of their work, they cannot afford to lose colleagues to another field—or to miss out on ways to harness the potential of designer-SME collaboration.

Right now, a retiring workforce, an explosion of data, and other factors are converging to form an abundance of information and growing challenges for designers. Because designers are required to simplify, organize, and deliver the most relevant information to the appropriate stakeholders, it is important to consider collaboration as an alternative to competition.

Perhaps it is time to explore the roots of traditional instructional design as an occupation and propose some common-sense ideas to make the process not only more efficient but also more human. Collaborative design is one key to this transition.

It takes a rare blend of intellectual capacity, thick skin, tolerance, and sensitivity for designers to do their job. They must mirror the preferences of SMEs while preserving the integrity of solid design theory. They also must steer SMEs toward the solutions that will create the most effective learning products possible, within the resource limitations of the project. If designers can do all of this without managing to insult the SMEs—or their years of specialized experience—they are world-class professionals indeed.

If you are one of many TD experts looking for a way to partner with your SMEs instead of competing against them, this Infoline will provide you with an awareness and strategy for the potential pitfalls and benefits involved. It will give you a roadmap toward collaboration that you can use.

To learn how to collaborate most effectively with your SME, you must first understand the dynamics of the designer-SME relationship. Then you will learn how to implement the three Cs (consult, collaborate, and continue) to strengthen your SME relationship.

**THE DESIGNER-SME RELATIONSHIP**

The roots of the workplace learning industry go back to a more easily defined, but less friendly time in workplace history. At a glance, it is easy to see why collaboration does not come easily to most workplaces.
The workplace of the 1940s was heavily influenced by World War II and an era that created models such as behaviorism and traditional instructional design. That era featured an assembly-line approach to production. In exchange for job security, rigid hierarchies were in place between workers, management, and other divisions.

Today’s workplace obviously has evolved beyond this environment, but at the same time, traditional design remains entrenched. When using the textbook approach to design, conflict is almost inevitable, as critics of traditional instructional design will point out.

There are a number of underlying reasons for the tension between instructional designers and SMEs, including
- little or no reward for collaborating
- an “it’s not my job” mentality
- the need to do things their own way
- time constraints.

So how do we begin to improve the relationships with SMEs? One key is to keep the “big picture” of shared goals in mind. Both instructional designers and SMEs desire many of the same goals, but differ on how best to accomplish them. The designers’ job is to move beyond competition and toward collaboration by empowering SMEs with the reasons why design can work for them.

**DEFINE YOUR ROLE**

It is important to communicate your role clearly and articulately to the SME. This keeps things within expectations and is part of explaining the process.

First off, TD experts—and more specifically instructional designers—represent several types of backgrounds, summarized in the following three groups:

1. The first group has little or no formal training. Members of this group may be trainers who are SMEs themselves and have never had the opportunity to receive any sort of design training. This group may have been given a book on instructional design, attended a professional event, or received a two-week “certification.” Often, these exposures are not sufficient to produce the depth of knowledge and experience that practitioners need to have.

2. The second group has a significant amount of informal training, from ongoing participation and input in a professional group to more rigorous class work in instructional design to a certificate from an accredited program. Members of this group have more of what they may need for the job than the first group. However, because they do not have an advanced degree in the field, they may hold back from working with SMEs and other stakeholders to promote the decisions that might produce the most effective results.

3. The third group has an academic degree in instructional design. Of the three, this group may be the most volatile in terms of results. On one hand, they likely have the awareness of evidence-based research and the ability to advocate for a design that will deliver those results in their current environment. On the other hand, some designers may stay rooted in the book theory they learned, without stepping out in the real world of their environment. For example, sometimes newer designers remain committed to a certain design model espoused in their program without realizing how flexible those models can be in the working environment. This can cause conflicts for designers, which can distract from the deadlines of their current job.
TEACHING SMEs TO TRAIN

HOW TO USE SMEs ............................................................... 47
SELECTING SME TRAINERS .................................................. 48
PREPARING SMEs TO TRAIN ............................................... 49
METHODS OF DELIVERY ....................................................... 51
COURSE DESIGN AND DEVELOPMENT FOR SMEs ............ 56
STAND UP AND DELIVER ...................................................... 60
TRAINING FOLLOW-UP IN THE WORKPLACE ....................... 61
EVALUATING THE TRAINING PROGRAM ............................... 62
CONCLUSION ........................................................................ 62

REFERENCES & RESOURCES .................................................. 63

JOB AID
SME Training Inventory Checklist ......................................... 64

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Subject matter experts (SMEs, pronounced smees) are individuals with more qualified expertise in performing a specific job, task, or skill than anyone else in your organization. Why are SMEs so important to training and performance? First, in today’s environment of using fewer resources to conduct top-notch training and get the biggest return on investment, using SMEs to train makes a lot of economic sense. Most organizations already employ SMEs to carry out their everyday business. Why not tap your internal smarts to benefit the organization as a whole?

Second, who better to conduct training than those individuals with the most expertise in a certain field? It can take training generalists weeks, if not months, to get sufficiently up to speed on a technical process or other job skill to prepare a curriculum. SMEs, on the other hand, already know this information. In addition, because SMEs have performed the job often and well in a variety of situations, they can provide real-world examples of how to use the skill or knowledge on the job. A SME’s experience provides learners with concrete, detailed images, which increases the credibility and effectiveness of the training.

Finally, many organizations can neither afford a large training staff nor take employees off the job to conduct training. To keep your organization up and running, why not explore the benefits of using SMEs—who are already performing vital business functions for your organization—to facilitate on-the-job training (OJT) programs that train other employees?

However, using SMEs is not without its hurdles. SMEs need a basic understanding of instructional design, along with how to present their expertise and appreciate how learners learn. Too often, we ask SMEs to conduct training, but we never tell them what training really entails. For example, your SME might be well versed in programming and administrating a computer network system, but may not have the first clue how to train the 500 people who are linked to and must use the network. One of the most important elements to collaboration between trainers and SMEs is a good relationship.

This TD at Work will show you how to:
- Select a SME trainer.
- Prepare the SME to train.
- Explain course design and development to SMEs.
- Help SMEs deliver and evaluate training.

HOW TO USE SMEs

This issue of TD at Work will help managers, training and performance specialists, and consultants guide SMEs through the fundamentals of transferring learning and job skills. It is important to keep in mind today’s business environment, which requires employees to receive training when and how they need it, in an affordable, effective manner.

You can use SMEs in the transfer of training or learning for:
- skills acquisition
- knowledge acquisition
- problem solving or attitude.

Skills Acquisition

Skills acquisition refers to the transfer of skills and processes that you can easily observe, replicate, and document. In this role, a SME performs what is most commonly referred to as “technical and skills training.” This training involves skills that are manipulative, calculable, or analytical (for example, learning computer spreadsheet software, running a piece of machinery in a plant, or completing a form). A trainer providing technical or skills training provides cognitive or conceptual information only to the extent required for participants to learn these skills.

Knowledge Acquisition

Knowledge acquisition refers to the transfer of material that helps individuals perform their jobs, without necessarily being an observable skill. Here, the SME trainer is the possessor of information about specific work. The SME shares this information with learners to enable them to
Problem Solving or Attitude

The transfer of problem-solving or attitude skills refers to the transfer of new methods of dealing with work and management issues to help individuals or groups perform their jobs better. In this capacity, the SME acts as a facilitator whose main focus is on the transfer of learning through group process (for example, improving group decision-making skills, solving a team conflict, or determining future work projects). Direct skill acquisition is not typically an objective of this type of learning.

SELECTING SME TRAINERS

The first step in selecting SME trainers is to identify what knowledge and skills the SMEs must have for you to consider them as a trainer for your course. You should base the required subject matter knowledge and skills on the content of the course. For example, selecting SMEs based on their expertise in delivering excellent customer service does you little good if the subject of your course is the orders processing system.

Accurately identifying the content of the course requires you to conduct a needs assessment. The end result of a needs assessment is to determine what specific job, skills, or knowledge you want to transfer to participants. The needs assessment identifies the gap between your employees’ current skill or knowledge level and the desired level. This information is the foundation for developing training objectives and the follow-up curriculum design.

You can select from a number of methods for conducting a needs assessment. If conditions are right, a mini needs assessment can provide you with good information. For other situations, you will want to invest the time and resources for a

BASIC DESIGN TERMS

SMEs probably are not familiar with basic lesson design terminology. The following definitions, taken from the glossary of the ASTD Handbook, should help SMEs get their design vocabulary up to speed in no time.

Case Study: A learning method in which a real or fictitious situation is presented for analysis and problem solving.
Delivery: Any method of transferring content to learners, including instructor-led training, web-based training, CD-ROM, and books.
Design: The planning stage of a learning initiative.
Development: Learning or other types of activities that prepare a person for additional job responsibilities and enable him to gain knowledge or skills. It may also refer to the creation of training materials or courses.
Evaluation: A multilevel, systematic method for gathering information about the effectiveness and effect of training programs. Results of the measurements can be used to improve the offering, determine whether the learning objectives have been achieved, and assess the value of the training to the organization.
Instructional Strategies: The mechanisms through which instruction is presented; sometimes called presentation strategies.
Simulation: The act of imitating the behavior of some situation or some process by means of something suitably analogous. In training situations, simulations range from simple live exercises to complex computer software. Simulations allow people to learn by performing and repeating an action in a safe environment. Simulations are popular for teaching decision making.
Trainers: People who help individuals improve performance by teaching, instructing, or facilitating learning in an organization.

BASIC TRAINING FOR TRAINERS

WHO IS A TRAINER?.................................................................67
LEARN HOW TO TRAIN..........................................................69
ADULT LEARNING THEORY...................................................69
TRAINING METHODS.............................................................69
PRESENTATION AND FACILITATION.........................................73
EVALUATION........................................................................74
MANAGERS AS TRAINERS.....................................................79
FOUR-STEP SKILLS TRAINING METHOD.................................79
CONCLUSION.........................................................................80

REFERENCES & RESOURCES ..................................................81

JOB AID

Training Trainers With the Four-Step Skills Training Method...... 83

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According to ATD's 2014 State of the Industry report, organizations spent on average $1,208 per employee on training and development in 2013, a 1 percent increase over the previous year. In 2014, the number of learning hours also increased slightly during that time period, from 30.3 hours to 31.5.

The need for adequate training may be greater now than ever, as the skills gap—which ATD defined in Bridging the Skills Gap as “a significant gap between an organization's current capabilities and the skills it needs to achieve its goals”—is substantial, both in the United States and globally. According to Bridging the Skills Gap, 84 percent of respondents reported a skills gap in their organization. The skills gap is present not only in STEM (science, technology, engineering, and math) skills, but also in communication skills, soft skills, and middle skills—those skills important in jobs that require more than a high school education but less than a four-year college education.

Bridging the Skills Gap respondents provided the following solutions: 64 percent answered that providing more training internally would close specific skills gaps, 55 percent suggested identifying core competencies and targeting their development, and 50 percent said examining what skills the organization needs to be successful now and in the future.

The talent development field has transformed substantially in the past decade. Four factors have played a major role in this:
1. economic uncertainty and volatility
2. advances in digital, mobile, and social technology
3. demographic shifts in the workforce
4. increased globalization.

In addition, neuroscience is playing an increasing role in how trainers approach their work and the environment that leaders try to create for their employees. For example, the PERMA model—which stands for positive emotions, engagement, relationships, meaning, and accomplishment—introduced by Martin Seligman, explains our level of well-being. More organizations are becoming more open to embracing these elements in their organization, as “The Positive Workplace” Infoline (available in volume 3 of the Train the Trainer series) highlights. Moreover, additional neuroscience research shows that learning environments should be low stress, enjoyable, and stimulating, as discussed in the “Memory and Cognition in Learning” Infoline (part of volume 1 of Train the Trainer).

Against this background, “Basic Training for Trainers” will provide a primer of the training landscape, including covering the following topics:
- the definition of a trainer
- the core skills a trainer needs
- training methods
- presentation and facilitation tips
- evaluating training
- the Four-Step Skills Training Method.

WHO IS A TRAINER?

It's a question with a surprisingly simple answer: Who is a trainer? Anyone who boosts the skills and knowledge of others. This can include such actions as showing a new employee how to file an electronic timesheet, demonstrating to co-workers how to use software, or teaching a person how to manufacture or test products to meet safety regulations.

Through instruction and practice, a trainer helps people:
- Gain new skills, knowledge, or behaviors.
- Acquire proficiency and awareness of products, processes, or methods.
- Achieve a defined or perhaps higher performance standard.

Trainers tend to focus their efforts in several areas:
- mandatory and compliance (such as safety and security)
- managerial and supervisory
- profession- or industry-specific (such as engineering, accounting, legal, and medical).
The following list of competencies comes from the 2013 ASTD Competency Study: The Training & Development Profession Redefined. The focus is based on the applications necessary for competency in two specific areas of expertise, Training Delivery and Instructional Design. Trainers should attain a level of proficiency in each of these competencies.

Training Delivery
Deliver informal and formal learning solutions in a manner that is both engaging and effective. Be able to:

- Manage the learning environment.
- Prepare for training delivery.
- Convey objectives.
- Align learning solutions with course objectives and learner needs.
- Establish credibility as an instructor.
- Create a positive learning climate.
- Deliver various learning methodologies.
- Facilitate learning.
- Encourage participation and build learner motivation.
- Deliver constructive feedback.
- Ensure learning outcomes.
- Evaluate solutions.

Instructional Design
Design and develop informal and formal learning solutions using a variety of methods. Be able to:

- Conduct a needs assessment.
- Identify an appropriate learning approach.
- Apply learning theory, which encompasses the collective theories and principles of how adults learn and acquire knowledge.
- Collaborate with others.
- Design a curriculum, program, or learning solution.
- Design instructional material.
- Analyze and select technologies.
- Integrate technology options.
- Develop instructional materials.
- Evaluate learning design.

Trainer for a Day

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References & Resources

Job Aid

Training Design Checklist

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What do you do if you are not an experienced trainer and are asked to conduct a training session? The goal of this Infoline is to help the occasional trainer design effective learning experiences for others. It can also provide a quick refresher for seasoned trainers.

First, think of yourself as a learning facilitator rather than a disseminator of information. Research has shown that training sessions that truly help people learn include active participation by learners. Standing in front of a group and delivering information doesn’t equate to teaching anything.

You don’t have to be a stand-up comic or a professional speaker to be successful. You do need to engage your participants to help them learn. The good news is that with an understanding of basic ISD (instructional systems development) principles, you can succeed.

So, what do you need to know to deliver an informative and engaging learning experience? In the pages that follow, you’ll find information on adult learner preferences, how to write clear learning objectives, and the variety of instructional methods available to you.

Before getting into the nuts and bolts of preparing your training, it’s good to familiarize yourself with some principles of adult learning.

**Adult Learner Preferences**

Adults have a wealth of experiences, which are filtered through a wide range of cultural norms, ethnic traditions, gender expectations, and socioeconomic perceptions. They are equally diverse in personality, age, occupation, motivation, education level, and skill. The work of many psychologists and educators—notably Malcolm Knowles on learner-centered andragogy and David Kolb on experiential learning theory—has yielded some basic principles of adult learning, along with implications for the trainer or facilitator.

**Adults Demand Respect**

Adults expect to be treated as adults—with respect. And, unlike the captive audience in elementary and secondary school, adults can walk out if their needs are not being met. Adults most likely have already done the “academic” theoretical work; now they want the practical, relevant skills. Don’t waste their time. Adults don’t need to know the history of the Internet if you are teaching them how to write an effective email.

**Adults Are Goal Focused**

Adults expect the relevance of the class material to their work or personal life established up front in the WIIFM question (What’s in it for me?). Or, they will walk out. Ask them where they want to be as a result of training, and write it down. At the end of the course, you can refer to their statements for accountability purposes.

Start by establishing what the “ideal” or competent level of knowledge or skill is. Find the gaps between the ideal and your learners’ current state by using self-inventories or pretests; then establish your goals. Training should be tailored to these specific goals only.

**Adults Are Self-Directed**

Adults require a degree of control in their learning. They want to be active participants. Allow adults to work autonomously or lead a group activity.

**Adults Need Relevance**

Adults need to know that what they are learning has a purpose. Show adults exactly how what they are learning will help them back on the job. Keep this in mind when you are creating your learning objectives and relate them directly to practical applications.
Adults Have Varying Levels of Motivation

While providing relevant training increases motivation, that motivation will wane unless the new skill or knowledge is used. Problem-solving activities and case studies help transfer the training quickly and boost motivation levels. Low motivation stems from a number of factors:

1. Fear of failure, as in “What if I can’t learn this software program?”

2. Difficulty unlearning an old approach, as in “Why do we need to work as a group? I always do things by myself.”

3. Distractions, as in “I hope the babysitter showed up.”

4. Suspicion that this is flavor-of-the-month training, as in “This is the third time we’ve had ethics training. Someone is covering up something.”

To combat the first three types of low motivation, the trainer needs to provide compassion and reassurance. The last kind of low motivation requires that the trainer obtain strong, demonstrated leadership or buy-in from the learners’ supervisors. These supervisors might also provide consequences for not following through with the training.

Adults Have Life Experiences

Help your learners link the new skills and information to their existing experiences. You may first need to include strategies to help them unlearn the old approaches. Elicit their real-world examples, have group discussions, and apply their new skills, knowledge, and experience in role playing or case studies. Remember to debrief these activities to draw attention to the key learning objectives.

Adults Are Short on Time

Be selective in your content. Keep your training sessions short, relevant, interesting, and powerful. Frequently link your learning activities throughout the training to their goals and WIIFMs.

Adults Have Different Learning Styles

Adults learn best using their preferred, most effective learning style. You can vary your training strategies (lecture, then demonstration, then a hands-on activity), but remember to be realistic. It’s not feasible to accommodate all learning styles for every module. Always include repetition along the way and build on the previously learned skills and knowledge.

Analyze the Purpose of Training

Before you jump in to design your training, take time to analyze the needs of your learners and the intended purpose of the training. Consider the following:

- the type of learning intended
- your audience and its knowledge of the learning subject
- expected results of the training

Types of Learning

Training addresses three types of learning: knowledge, skills, and attitudes. Decide what type of training you are delivering. Are you building intelligence? Teaching new skills? Influencing the attitudes of employees? The type of learning that you are trying to impart will influence the instructional methods that you use.

Audience

Find out as much as you can about your learners including their familiarity with the training topic. Send them a quick survey on the topic, if time allows. The answers will give you some insight into their level of knowledge. Numerous easy-to-use survey tools are available on the Internet at little or no cost.

Demographic information is useful as well; your training session for a group of college seniors will be different from that for a room of high-level managers. You may also want to know if English fluency or literacy is a problem. Cultural differences can affect your training too.
LEARNER-CENTERED CLASSROOMS: IT’S ALL ABOUT RELATIONSHIPS ........................................ 105
QUALITIES OF HEALTHY, HIGH-PERFORMING RELATIONSHIPS .. 110
PUTTING IT ALL TOGETHER FOR DYNAMIC, LEARNING-RICH CLASSROOMS ........................................ 114
CONCLUSION .................................................................................................................. 115
REFERENCES & RESOURCES .................................................................................. 118

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QUALITIES OF HEALTHY, HIGH-PERFORMING RELATIONSHIPS .. 110
PUTTING IT ALL TOGETHER FOR DYNAMIC, LEARNING-RICH CLASSROOMS ........................................ 114
CONCLUSION .................................................................................................................. 115
REFERENCES & RESOURCES .................................................................................. 118

JOB AID

Using Four-Part Objectives to Design Learner-Centered Instruction ........................................ 119

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Sometimes professionals find themselves responsible for leading classrooms without any formal preparation in instruction or classroom dynamics. They may be subject matter experts who are called upon to provide training for workplace learning, or they may be deep experts who choose to teach in classrooms of higher education. During the course of my career, I’ve worked with many people who find themselves in this situation, whether adjunct faculty, college professors, or guest speakers in training events. Many of them find the task daunting, and in preparing for the responsibility of providing and building dynamic classrooms, they are searching for a framework to help them understand the classroom and connect with the learners in it.

This TD at Work is written for both novices in search of a simple and meaningful way to develop their instructional skills and seasoned practitioners who are looking for a new or different way to freshen their instructional approach. This issue is also valuable to any learners who want to more fully engage with their classroom-based learning and encourage more balanced, learner-centered instruction.

Learner-centered instruction is an important and simple way for any practitioner to prepare a classroom that offers the best experience for the participant. When the learner—rather than the instructor—is the focus of the instruction, the learning becomes more meaningful to the participant, provides more opportunities for the learner to engage with the content, builds more connections to improve knowledge transfer, and encourages a variety of teaching methods within the learning event.

In a learner-centered classroom, the student takes ownership of the content, determines ways that it may be useful or relevant, and builds the relationships that will allow the learning to endure.

This TD at Work will show you how to:
- describe the four relationships within any classroom, whether online or face to face
- list different instructional techniques that will maximize the learning relationships within your classroom
- balance your approach to instruction so that your classroom is more learner-centered and learning-rich.

**LEARNER-CENTERED CLASSROOMS: IT’S ALL ABOUT RELATIONSHIPS**

Professionals who will be instructing for the first time often don’t know where to start. It’s not uncommon for their design conversations to begin with, “I have a great idea for an activity I want to use,” or, “I have a PowerPoint with all of my content, and I’m planning to teach from that,” and “I’m struggling with how to organize all the information; there is so much the students need to know!”

Deciding what to teach and how to teach doesn’t have to be arbitrary. In addition to the many learning theories and models of instructional systems design from which to choose, there are other ways to think about instruction and the learning event. For example, I often look to the principles of design thinking to help me decide how to organize a classroom. Design thinking is inherently human centered;
LEARNER-CENTERED CLASSROOMS

Rather than designing the classroom from the instructor’s perspective, consider designing the classroom from the learner’s perspective. Similar to the principles of human-centered design, this approach encourages the design of learner-centered instruction. In learner-centered classrooms, there are four primary relationships. Attending to each will allow for more meaningful, durable learning to occur.

1. **The learner-to-instructor relationship**: Consider how to develop a trusting and encouraging dynamic between each learner and the instructor.

2. **The learner-to-content relationship**: Consider how to develop a meaningful and sustainable connection between each learner and the material being taught.

3. **The learner-to-learner relationship**: Consider how to develop an interactive and supportive rapport among the learners in a learning event.

4. **The learner-to-self relationship**: Consider how to develop an honest and reflective bond between the learner and herself.

Learner-centered instruction offers a different way to have the conversation about how to teach and how to design a learning event. It takes an empathetic approach to learning from the vantage point of the participant. As the name implies, in a learner-centered classroom the design of instruction shifts focus from who will be teaching and what will be taught, to who will be learning and how they will participate. For those professionals who are not instructional designers or trained instructors, a learner-centered classroom can relieve a lot of pressure. If a subject matter expert has never led instruction before, she may be concerned about being the center of attention and anxious about being the sole authority in the classroom. Professionals who find themselves in these positions often remark, “I have deep subject matter expertise, but I don’t know how to teach.” Because learner-centered instruction changes the dynamics in a classroom, teaching is less important than learning. The learner experience is prioritized over the instructor experience, and relationships are the centerpiece of the classroom—not expertise. There are four primary relationships in the learner-centered classroom:

- the learner-to-instructor relationship
- the learner-to-content relationship
- the learner-to-learner relationship
- the learner-to-self relationship.

The Learner-to-Instructor Relationship

Of all the relationships within a classroom, the learner-to-instructor is perhaps the most obvious. From our formative experiences in education, most of us are familiar with hierarchical classrooms with the teacher in the front and the students in their seats. Typically, the instructor is the leading expert and the provider of information and knowledge. Teaching occurs when the instructor shares this information with, or transfers it to, the students.

Most adult learners arrive in the workplace or a higher education classroom with a similar expectation—they enter with a passive mindset and empathy is at the core of human-centered design. Looking at the classroom from the learners’ perspective and empathizing with how they experience the learning event is a practical and meaningful way for instructors to prepare their course. While it might seem nuanced, or too slight a difference to matter, putting the learner—rather than the instructor—at the center of the instructional experience makes all kinds of new relationships possible and expands the framework from which the instruction is designed.

LOOKING AT THE CLASSROOM FROM THE LEARNERS’ PERSPECTIVE AND EMPATHIZING WITH HOW THEY EXPERIENCE THE LEARNING EVENT IS A PRACTICAL AND MEANINGFUL WAY FOR INSTRUCTORS TO PREPARE THEIR COURSE.
GREAT PRESENTATIONS

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PREPARING FOR YOUR PRESENTATION ........................................... 123
CREATING THE PRESENTATION .................................................. 125
CHECKING YOUR NERVES .......................................................... 131
CHOOSING VISUAL AIDS ............................................................ 133
GOING VIRTUAL ........................................................................ 137
CONCLUSION ............................................................................. 137

REFERENCES & RESOURCES ......................................................... 139

JOB AIDS

Preparing Yourself to Present ....................................................... 140
Preparing Your Content to Present ................................................ 141
Preparing to Close Your Presentation ............................................. 142

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For many people, delivering presentations is part of everyday life. No matter your position or title, whether you work in a small or large organization, nonprofit or for-profit, government or association, chances are a time will arise when you will need to deliver a presentation. And it probably will happen more than once. Most inexperienced presenters (and even some experienced ones) get nervous just at the thought of having to speak in front of a group, no matter who the audience is. It is sometimes even said that public speaking ranks higher than death among people's greatest fears. But it doesn’t have to be that way.

Because there are many places and situations where you might give a presentation, it is safe to assume that there are many types of presentations. Each requires a slightly different kind of preparation. This TD at Work is designed to help you craft and deliver a memorable, informative presentation or speech.

This issue will offer guidance on:
- preparing your presentation
- controlling your nerves
- selecting proper visual aids
- delivering virtual presentations.

The principles covered here can be used in a variety of public speaking situations, such as introducing another speaker, accepting an award, or delivering a proposal. Different types of speaking events have their own unique set of rules and guidelines, so it is always best to seek out guidance from those you are speaking for.

This issue of TD at Work is unique because, in addition to including our typical checklists and tips, we’ve enlisted some of the elite professionals in the training and presenting world to offer advice and words of wisdom. With their help, you’ll learn to present like a pro.

**PREPARING FOR YOUR PRESENTATION**

We’ve all been witness to a failed presentation. A presentation that has actually made us, as members of the audience, uncomfortable. How does this happen? Why do presenters fail? The most likely answer is lack of preparation. The presenter was overly confident, too busy, or put it off until the last second. Don’t let this happen to you! No matter how far in the future your next presentation is, it’s never too soon to start preparing.

To get your preparation underway, ask yourself some basic questions:
- What am I presenting?
- Whom am I presenting to?
- Why am I presenting?
- What do I want to see happen?

This all seems fairly simple—which is why it gets skipped so often. But this vitally important step needs to happen each time you present or speak. (As you read the sidebars from our speaking professionals, you'll see this theme repeated time and time again.) Let’s drill down further and get to the goals of each of these questions.

**NO MATTER HOW FAR IN THE FUTURE YOUR NEXT PRESENTATION IS, IT’S NEVER TOO SOON TO START PREPARING.**

**What Are You Presenting?**

Here you need to figure out your content. If you’ve been asked to present on a similar topic in the past, then this part is mostly done for you: Just update your existing material to be accurate and timely, and tweak any points to fit the audience and the purpose of the presentation.

If you are creating material from scratch, then you have a little more work to do. If you’ve been asked to give a presentation on a topic, chances are you’re already a bit of an expert in that area. Start jotting down main points or areas that you want to cover. For instance, perhaps you are an experienced manager in your organization and are asked to give a presentation on the basics of new employee orientation and onboarding. You would want to cover such topics as whom to involve; supplies to collect; and activities to schedule before employees’ first day, on their first day, and after their first day.
Whom Are You Presenting To?

Who is your audience? They may be as close to you as the people in your department, or you may have never met them before in your life. Whatever the case, you want to learn as much as you can about them, along with what they know about the topic. Some key questions to ask may include:

- At what level in the organization are the audience members?
- How familiar is the audience with the topic about which you are speaking?
- Is audience attendance mandatory or optional?
- How will the audience benefit from your presentation?
- How large is the audience?
- Is the audience likely to agree with your views? Or will they have a different opinion?
- What demographics does the audience represent?

All this information—and anything else you can obtain—should be researched and analyzed well in advance of the presentation. You will then be able to customize the content of your presentation to reflect the audience. No matter what type of presentation you are giving, you always want to build on what the audience already knows. When an audience notices that the presentation has been created specifically for them, you are much more likely to get buy-in for your call to action.

Why Are You Presenting?

The quick answer often is because you were asked to. But that answer doesn’t help you shape your presentation; to do that, you need to dig a little deeper. Is there a reason that a presentation has been requested—versus some other form of updating employees (newsletter, website, article, book, and so forth)? Here you want to consider:

- What needs do the audience members have?
- Why are they attending your particular presentation?
- What do participants expect to learn from your presentation?

- What do the participants’ supervisors expect them to learn?
- How are you in a position to fill that need?

These are important questions to answer during your analysis steps so you can use the answers as you form your presentation.

In addition to there being a reason for the presentation, there is a reason you are the one doing the presenting. Maybe you are the subject matter expert on the topic at hand, and the group wants a quick and informal “tips and tricks” training. Or perhaps you will be the team member leading a specific project or initiative, and the expectation is a presentation on the project plan. Knowing this information will help you fit your presentation’s tone and depth to your audience.

What Do You Want to See Happen?

The last question to ask as you are preparing yourself to present is about what the outcome of your presentation is supposed to look like. Is it a motivational presentation, intended to get everyone excited? Is it meant to demonstrate a new set of processes and skills that management wants the staff to master? Or is it simply an introduction of another speaker? There are many different styles and types of presentations—and each style or type has a different form and includes different elements. A presentation to motivate and inspire the team will look very different from a presentation on the 10 steps to using the new accounting software or one that introduces a senior leader to speak at your conference.

Making sure you know the desired outcome is essential to a great presentation. One of the worst things you can do as a presenter is come to a speaking engagement where you’ve written a talk with the wrong outcome in mind.
Managing Difficult Participants

Training Basics

Managing Behavior ................................................................. 145
   Understand the Training Agenda ..................................... 145
   Know Yourself .................................................................... 147
   Understand the Group ......................................................... 152
   Get Them on Board ............................................................ 152
   Manage Specific Behaviors ............................................... 155
   Use Your Last Resorts ....................................................... 157
   Follow Up and Analyze How It Went ............................... 157

References & Resources .......................................................... 158

Job Aids
   Getting the Jump on Difficult Behavior: A Worksheet ....... 159

Infoline is a real got-a-problem, find-a-solution publication. Concise and practical, Infoline is an information lifeline written specifically for trainers and other workplace learning and performance improvement professionals. Whether the subject is a current trend in the field, or tried-and-true training basics, Infoline is a complete, reliable trainer’s information resource. Infoline is available by subscription and single copy purchase.

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Managing Behavior

So you’re in the training room, doing your best to help people learn skills that will make a real difference in their jobs and organizations, and what happens? You hear a whispered discussion going on that clearly has nothing to do with the material you are presenting. You watch as other participants nearby become distracted and lean in to hear the side conversation better and get all the juicy details.

Or maybe you have a participant determined to show she knows more about the subject than you do. She interrupts and dominates the conversation every chance she gets. No one is getting a word in edgewise, including you, and the constant challenge to your authority is getting on your nerves.

Maybe you are thinking, “What is wrong with these people? Don’t they know they are wasting everybody’s time and their organization’s money? They are acting like children, and I need them to get in line. NOW!” And you pick up your pointer and slam it down hard on the desk in front of the offending individual. No, of course you don’t. But you do feel frustrated, angry, and ready to “punish” the participant in some way.

Well, slow down. Take a deep breath and remember why you are there: To teach adults. And that means that you have to get over your own emotions, which isn’t always easy or gratifying. But in the end, what you will gain from setting aside your feelings and focusing on the learners and their needs is confidence in your ability to manage disruptions and pride in your professionalism.

One key piece of information you need to understand before you do anything else is that difficult behavior in the training room is rarely—if ever—personal. And to be able to deal with it well, you need to depersonalize it in your own mind. In Facilitation Basics, Donald V. McCain and Deborah D. Tobey explain how: “The depersonalization process begins by making a change in how difficult participants are considered. Rather than label them difficult participants, call it disruptive behavior. In this way, you are labeling behavior—not people—which is a good place to start depersonalizing the event.”

Now that you know why you need to depersonalize the disruptive or difficult behavior, the next step is to learn to manage those behaviors. In Dealing With Difficult Participants, Bob Pike and Dave Arch say that you have two tasks to accomplish in dealing with difficult participants, or rather, disruptive behavior: you have to get the participant who is displaying the behavior on board with the training, and you have to minimize disruptions to the rest of the participants. The following steps are intended to help you do just that:

- understand the training agenda
- know yourself: your fears and triggers
- know the participants
- get the participants on board
- manage specific behaviors
- use your last resorts
- follow up by assessing how you did.

Understand the Training Agenda

To manage difficult participants effectively, you need to know exactly what the purpose of the training is. In front of a room full of participants, understand what you need to accomplish to make the training meaningful for them. And that means that you—your ego, your feelings, your wants—play second fiddle to the message or the content you are helping these participants learn and incorporate into their work and lives. The method you use to accomplish this is less important than responding to your learners’ particular needs and getting the message across in a way they can absorb and use.

There’s more to understanding the training agenda than just knowing the topic you are going to teach and committing yourself to the message (and not to your personal agenda). You need to understand how this new knowledge will affect the participants, their ability to do their jobs, and the intended business outcomes that result from changes in the ways that they do their jobs. Not only does your understanding of this help win over participants who may think that the train-
ing is a waste of their time, but it also helps you understand other objections to the training. For example, if you know that participants are being taught to use a new computer program or process that may make some of their jobs obsolete down the line, you can be better prepared for resistance.

How do you find out what the business outcomes of the training are intended to be? One way to find out is to refer back to the original needs analysis. According to “Be a Better Needs Analyst,” Infoline No. 258502, the purpose of a needs analysis is to identify the right knowledge gap as well as the right training to fill the gap. Reviewing data from the needs analysis will tell you what the original need was, how the training you are about to provide fills that need, and who should get training.

Needs analysis data also will tell you what levels the training will reach: individual, departmental, divisional, regional, or organization-wide. The extent to which training applies to these levels will affect how it is perceived. For example, if the training applies to the entire organization, it may be perceived either as a necessary evil, an arbitrary and valueless requirement from higher levels in the organization, or as a threat, if the training is part of a larger change initiative. Or if the training applies to an individual or a department, it could be perceived as a punitive measure. Understanding potential negative perceptions of the training will help you recognize issues when they arise in the training room.

As you analyze the results from the needs analysis, try to identify anything about the training that might trigger disruptive behavior. For example, has the training been initiated because of poor performance? Some individuals may view the training requirement as a criticism of their abilities and therefore be hostile to it. Is the training part of a larger change initiative? Not everybody is comfortable with change and may resist anything related to change.

When you have a clear idea of the gap that training is supposed to fill, boil the agenda down to a single sentence and make it your mantra. The sidebar Value of a Training Mantra at left presents an example of how you could use a mantra for a training session. Use the questions in the sidebar What’s the Purpose? at right to help you define your training agenda.

Having a mantra provides three benefits. First,
5 QUESTIONS FOR GREAT PRESENTATION VISUALS

ALIGNING VISUALS WITH YOUR MESSAGE ........................................ 163
WHY SHOULD I REPRESENT MY MESSAGE VISUALLY? .................. 164
WHICH IDEAS SHOULD I REPRESENT VISUALLY? ......................... 166
WHAT DOES THE CONCEPT LOOK LIKE? ................................... 167
HOW DO I WANT MY AUDIENCE TO FEEL? ............................. 168
WHERE DO I FIND GREAT IMAGES? ......................................... 169
CONCLUSION ....................................................................... 172

REFERENCES & RESOURCES ..................................................... 173

JOB AIDS

5 Steps to Letting Go of Text-Heavy Presentation Slides ............... 174
Which Idea or Concept to Visualize? ......................................... 175

Need a trainer’s lifeline? Visit td.org/tdatwork.
Years ago I saw a presenter who had full command of the room. The audience was engaged, the presenter had my full attention, and I respected him. Everything was great, until he distributed the first handout. This document and his other presentation materials were so dated that I started questioning whether his expertise was as old and dusty as his materials. I started to doubt him, and for the rest of the workshop I struggled to listen to him.

I worked to ignore my doubts because the topic was very important to me. But most presentations aren't that important to the audience, and most audience members won't struggle with their doubts. The doubts will win and the presenter will lose his audience. From this experience, I learned that being an effective presenter is more than using a powerful voice and great body language. It also includes using presentation materials that are (at least) as strong as you to help you convey your message.

Our ability to communicate effectively is a key component to our personal and professional success. And with so much communication taking place through presentations, the need for creating strong, clear, and memorable presentations is growing every day. Think about the last presentation you saw. Did it engage you? If not, how long was it before you tuned out? Chances are that it wasn't too long before you started checking email or surfing the Internet.

Now think about the last presentation you delivered. Did it engage your audience? Could your presentation have benefited from brighter, crisper slides? If you're not sure how engaged your audience was, or whether your presentation could have used improved visuals or slides, you are not alone. But how do you go about improving the visuals in your presentations?

If you're ready to add powerful images and visuals to your presentations, but aren't sure where to start, this TD at Work is for you. I'm going to answer five questions that will guide you through adding visual oomph to your presentations. Note: While I refer to PowerPoint presentations throughout this TD at Work, slides also can be created in other applications such as Keynote and Haiku Deck. The tips presented apply to all presentations, regardless of the application used to create them.

In this issue of TD at Work, you will:
• Learn why it’s important to align visuals with your presentation’s message.
• Answer five questions about your presentation’s visual images.
• Read real examples about using visuals.
• Receive tips on how to use visuals.

ALIGNING VISUALS WITH YOUR MESSAGE

Every presentation has a key message or a big idea—that’s the whole purpose of a presentation. The message might be to inform the executive team about third-quarter results or to teach the customer service reps about the five steps for resolving a customer call. When a presentation includes slides, every slide plays a critical role in driving home that big idea.

As you think about visuals (which can be photographs, illustrations, flowcharts, tables, infographics, or other graphics or images), it’s important to keep your presentation’s key message front and center so that you choose visuals that support and drive home that key message. Remember why your big idea is important to your audience. What will it help them do? Will it save them money or time; will it increase their revenue? Keeping your audience and your presentation’s key message in mind as you answer the five questions will help you find the perfect images to deliver a compelling presentation.

As you read through the questions, you may find it useful to think about a specific presentation—either one you have designed recently or are designing now. Perhaps you’re still not sure this presentation needs effective visuals. If so, you’re ready for the first question.
WHY SHOULD I REPRESENT MY MESSAGE VISUALLY?

You might be thinking, “I'm already busy; do I really need to spend precious time thinking about how to represent my presentation message visually?” Yes, you do, because well-chosen, well-placed visuals reinforce your message better than text alone.

The human brain loves pictures, and visuals are processed by the brain much faster than words. Here’s how: Information is first processed in the brain by sensory memory, or what Jonathan Halls, author of the Infoline “Memory and Cognition in Learning,” calls the “gatekeeper.” Sensory memory takes in what we see, hear, feel, smell, and taste from the outside world and determines what's most important to send on for further processing in short-term memory. According to Halls, in sensory memory, images are recognized before words. Consequently, your audience can start processing your message more quickly when it’s accompanied by the right kind of visuals.

Images are also processed by a different part of the brain than words, so using visuals engages multiple areas of the brain. That means your audience is spending more brain power processing your message when you use words and images to deliver your message. When those visuals are easily processed, your message seeps deeper into their brains.

Furthermore, the brain processes words and images in different ways. As Lynell Burmark explains in Visual Literacy: Learn to See, See to Learn, words are processed by short-term memory, but images go right into long-term memory. When you combine visuals and words to present your message, you are actively engaging both short-term and long-term memory, which makes your message more memorable.

THE SCIENCE BEHIND VISUALS

There's a growing body of learning science and neuroscience supporting the benefits of using visuals in learning and communication.

Memory and Cognition
Visuals enhance learning retention in multiple ways. Visuals also help us make sense of complex, abstract, or fuzzy concepts. For example, the picture superiority effect asserts that the brain has a tendency to recall certain types of learning better when learned using a combination of pictures and images. In her book Visual Design Solutions, Connie Malamed suggests that one reason picture superiority may work is because of dual coding, the theory that messages accompanied by visuals are processed through two channels in the brain—one channel for the verbal input and another channel for the visual input.

Brain Physiology
The human brain is incredibly powerful, and most of that power is dedicated to visual processing. In their book, Basic Vision: An Introduction to Visual Perception, psychologists Robert Snowden, Peter Thompson, and Tom Troscianko assert that at least 50 percent of the cortex is used for visual processing and only around 10 percent is used for auditory processing. Adding a visual component to your message takes advantage of that 50 percent and puts it to use on your behalf.

Furthermore, according to Ann Herrmann-Nehdi—who whose company, Herrmann International, has developed a “whole-brain thinking” system that encourages creative, innovative ideas—actively engaging both hemispheres and all four quadrants of the brain provides a larger field from which to form connections and make sense of something. Using words and images to help you convey your message actively engages both hemispheres and multiple quadrants. For example, words are processed primarily in the left-frontal lobe, left-temporal lobe, and prefrontal cortex. Images, however, are processed primarily in the visual cortex in the occipital lobe. Activating multiple areas of the brain means your message is being absorbed by more of your brain.