

# Training 101: Logistics for Delivering Face-to-Face Instruction

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*Practical techniques for organizing, delivering, and surviving your first-ever face-to-face training course. While the focus is on computer software training, the information can be readily adapted for other training situations.*

*The first section deals with physical preparations such as setting up the room and checking equipment. The second offers practical tips for delivering the training, such as dealing with troublesome people, using various delivery methods, and getting feedback.*

*Intended audience: For those who know their subject matter/product very well, but have no teaching or training experience – as the 'resident expert' they have been asked to train others.*

## ASSUMPTIONS

This paper assumes that many preliminary activities have been done and that all relevant documentation is available to you, including Training Needs Analysis, audience analysis, the training plan and the training course (including objectives and outcomes), as well as all the course materials (manuals, presentation slides, exercises, course outlines, handouts, etc.). If you are training at a location away from your office, it is assumed that travel arrangements have been made. Finally, it is assumed that you have been asked to present the training course because you are familiar with the course content.

## INTRODUCTION

Delivering a training course is a variation on public speaking, and so is right up there in the list of most-feared activities for the majority of the population. However, just because you know something really well doesn't mean you can teach it to others. We've all attended presentations where the personality of the presenter couldn't make even the most interesting material sparkle. While this paper can't turn an introvert into an extrovert, it can help you prepare for delivering your first-ever training course.

Follow the Boy Scouts' motto: 'Be prepared' and add to it 'Be early'. You'll eliminate a lot of nervousness if you know that everything is ready and working. Of course, unexpected disasters may still happen, but you *can* plan for almost everything else.

## BEFORE THE BIG DAY

It is useful to know what goes into a training session even if you're not responsible for all the preparations. If you are likely to do more training, you may want to create your own checklists of all the things you need to organize. (Detailed sample checklists will be distributed to attendees at the STC Conference session.)

### **Check and recheck**

Prior to the course, you'll need to make sure everything is ready; don't assume it's all been done. Check and recheck that everything is working and that all material is ready for you – you may have to do it yourself, but it's better than looking foolish in that first class when you find that the course material didn't get printed, or that the projector has been borrowed by someone else, or that half the computers don't have the correct software installed. It makes you look unprofessional, and undermines your confidence.

### **Cast a spell**

Spelling errors, typos, incorrect punctuation, and grammatical errors must never occur in formal material. They make you and your organization look unprofessional, and result in participants questioning the information that they are receiving from you ("If you didn't care enough to proof the materials, what else didn't you care enough to do?"). Many organizations leave some of this documentation to the office administrative staff, so make sure you check for errors that may go unnoticed. If no one in the organization can check the materials, it pays to contract an editor to go through them. Look out for errors in registration / confirmation / reminder letters and e-mails sent to participants, name tags, name 'tents', and *all* course materials (including outlines, presentation slides, and feedback sheets).

### **People power**

If something unexpected happens, do you know the contact names and phone numbers of the people who can assist – and do they know yours? For out-of-hours courses, make sure you also have the names and phone numbers of the maintenance and security staff. If you're travelling to an out-of-town location, you need to have the home number of a contact to call in case there is an emergency that could delay or cancel the course. Does the client and your office have a copy of your flight/hotel information? Do you know the contact details of the

person who will pick you up from the airport? Or how to get to the hotel or venue?

### **Room with a view**

Check the training room—you and your group will be spending all your time in there, so it needs to be right. The room should be available at least an hour before and after class time for setup and clean up. One of the first checks is to make sure it is large enough to accommodate everyone as well as the equipment and your materials, and that there are sufficient chairs and tables. If you need disability access, has this been taken into account? Check the arrangement of the furniture. For a small group, a square, circular, or U-shape works best, particularly if discussion is part of the learning activities. Don't forget that you need to move about the room, so make sure you can physically get to everybody. Make sure all projection screens, whiteboards, and flip-charts are clear of previous materials and can be clearly seen from all positions in the room. Check the lighting, temperature, ventilation, and noise levels—even if you can't do anything about them, being aware of any limitations beforehand helps. Make sure you know the location of the coffee facilities, phones, and restrooms. Are there any safety, emergency, or security issues you need to be aware of?

### **Are you well equipped?**

Don't let technical difficulties mar a successful training session. Anticipate potential problems and, where possible, check the facilities and audio-visual equipment in advance. Make sure you have plenty of cords and cables that are the right type and of sufficient length to give you the flexibility to operate from wherever you want. Tape down loose cables. Check that all requested equipment is in place and working—and that you know where the projector's spare lamp is just in case its 400-hour life is up right in the middle of your course. Check that the required software has been installed and is working, and that the Internet connection is active if you need to access it (you may like to have offline copies, just in case). Make sure you have the login IDs and passwords for the training room computers. Double-check your presentation computer to make sure that *nothing* on the desktop or in the directories that you need to open contains anything that could be offensive or confidential. Remember, every little file and folder name will be projected onto a big screen. Is there a supply of markers and do they work? Avoid unreadable colors such as yellow and orange, and replace any that are fading. Check the size of your writing on the board to make sure you can read it from the rear of the room. If your handwriting is awful, print! In addition to sufficient course materials for everyone, make sure you have an unbound set, as well as a backup CD of the slides and documentation. If your equipment goes astray, or your laptop breaks down, you can rent or borrow a spare and

the show will go on. Make sure the batteries on your laptop and cell phone are charged. Your cell phone is your lifeline back to the office if things go awry. Don't forget to turn your phone off just before you start.

### **Look after yourself**

Take care of your needs. There may be times when you cannot take a break with the participants, as you may have to switch programs, reinstall software, put out new training materials, and so on. So consider having your own food and drink supplies such as an insulated coffee mug with a lid, teabags/instant coffee packets, instant soup, bottled water, bagged lunch, fruit, cookies, crackers, etc. Protect your back by using a suitcase on wheels with a pull-out handle—it makes carrying all your materials much easier and looks more professional. If you're new to standing in front of a group of people, you may exhibit such classic "first night" symptoms as a dry mouth (make sure you have a pitcher of water and a glass available, and clear your throat before you start), "butterflies" in the stomach, and hands that shake (initially stand behind a table or podium and hang on to it; avoid holding a single sheet of paper as this will only emphasize your nervousness). You can do little about a shaky voice except let the participants know that this is your first time. Almost everybody will be sympathetic and very forgiving of any mistakes you make.

### **Practice makes perfect**

Well, perhaps not, but practicing what you'll say—out loud, in front of the mirror—makes you familiar with the content as well as the timing and pacing of the delivery of the course. Find out what material *must* be covered, and what can be skimmed or skipped due to time constraints and class needs. Watch out for any physical habits you have that may be distracting to others, such as arm waving, standing perfectly still, or staring at the ceiling. If you can't see your bad habits, others can, so ask them. Be prepared to be told about little quirks you didn't even know you had, like saying "er", "um", "like", or "OK" all the time, or finishing every sentence with a rising inflection as though it was a question. Canadians and Queenslanders—watch the "ay" at the end of your sentences.

## **ON THE DAY**

If you can, find out something about the participants in advance: their names and organizations, what positions they hold. If you received a class list, that's a start. When participants start to arrive, you should be ready. Use this opportunity to grab a water or coffee and introduce yourself to each one as they arrive; you may want to hand out the name tags to reinforce their names. This simple action can help you gain immediate impact as a presenter, as well as help you minimize your nervousness; it establishes a connection with your

audience before you even start. And don't forget... in most cases, the participants are not your enemy – they are on your side!

### **First impressions DO count!**

As a training presenter, you only have a few seconds before your audience starts forming an opinion about you. So projecting a positive and professional image is crucial. Two key factors that determine your image are your dress and attitude.

**Dress.** Your dress has to communicate a professional image, while being comfortable for you and appropriate for the group. Try and find out the dress "code" of your audience and dress one level up. Use your own style—don't try and imitate someone else or try a new look if it is radically different from what you normally wear. You want your audience to focus on you and your message, not your clothing, so never wear an accessory or article of clothing that detracts from your message.

**Attitude.** The only attitude that is appropriate is a positive one. No one wants to listen to an unenthusiastic or disinterested trainer. If you don't have a positive attitude, then you can't expect your audience to be positive about the training. If you are having problems getting into an upbeat mood, try thinking about something that makes you happy, or visualize a place or time where you are always in a good mood, then bring those feelings back to your presentation.

### **Let's begin...**

For you, the first few minutes are probably the most important of the day—you will either grab your audience then, or fight to get their attention all day, so make it snappy, snazzy, and show that you are in control.

**Write it up.** Before the participants come in, take a couple of minutes to wander through the room visualizing yourself giving a successful presentation from the various spots. Write the name of the course and your name (and your preferred method of address) in a corner of the whiteboard so that no one forgets it with all the other information they'll be getting. Put on your name tag. You might want to write the areas you'd like each person to cover when they introduce themselves (e.g., name, position and/or organization, their assessment of their current knowledge of the content, what they expect from the training course, etc.).

**Waiting, waiting...** Start on time! Do NOT reward lateness by waiting for stragglers. It punishes those who got there on time. Don't apologize to latecomers by saying "Sorry. We started without you." This may give them the attention they are seeking by being late. People with buses, trains, or planes to catch can't be expected to stay back an extra hour just because you've run over

time. Of course, starting on time means that *you* need to be there on time—preferably between 30 and 60 minutes before the initial start time for a final check—and you need to be back in the room a minute or so before the start of each session after a break.

**What's in it for me?** Tell them the name of the course (this is always a good idea—people do end up in the wrong room) and briefly list the benefits to them. For instance "Good morning everyone. My name is <first name> <last name>, and today you'll be learning about <X>. At the end of the day, you will be able to .....". Put this in terms of what they will be able to do at the end of the course (i.e., the course outcomes). Be upbeat and positive—smile as you're talking as this always makes your voice sound brighter and you look better.

**"Can you tell me where...?"** Next, give them the housekeeping details; for example "Before we start, I'll go through some important stuff, like where the restrooms are." Include such information as the male and female restroom locations, when the breaks will be, where the coffee facilities are, what arrangements have been made for lunch, where the public phones are located. If there are any site-specific details that must be covered, do this now (for example, no smoking, fire exits, location of evacuation plans, special facilities for those with disabilities). Make participants aware of any safety and ergonomic issues related to the room, the layout, the furniture, and the equipment. And make sure you get them to turn off their cell phones! Don't forget to cover the rules of the training room—some venues do not allow food and drink in the training room. So make these rules clear. If there is a clock in the room, get everyone (including you) to synchronize their watches.

**Me, me, me!** Audiences assess not only what is presented, but who presents it—the messenger is just as important as the message. So establish your credibility early: tell them a little bit about yourself in relation to the course (your expertise, previous experience in similar roles, and your job title if it is relevant). The participants don't want your life story. but they do want to be sure that you know what you're talking about. Keep this introduction to about 30 seconds.

**Break the ice.** Go around the group and ask each participant to introduce themselves with a *brief* (30 seconds) summary of their experience and skills and what they expect from the training course (use the headings you wrote on the whiteboard to prompt their responses). Make sure you establish eye contact with whomever is speaking, then thank each person, by name, for their response before moving on to the next person. And don't forget anyone! The best way of not missing anyone is to start at one point of the room and go around the room in a logical manner; if you choose randomly, you're bound to miss someone. **Note:** Some people feel intimidated by this sort of activity, so you may want to

make it optional, and accept that some may just want to say their name.

**Preview the day.** Go through the course outline, briefly fleshing out some of the day's activities. Encourage participants to ask questions during the course. Depending on how the course is structured, you may request that they save questions until the end of a session ("time-box" a few minutes for this), or you may allow them to ask questions at any time. Let them know now that if a question veers too far away from the topic, you'll not answer it at the time but will suggest that they write it down so that you can return to it if there's time at the end of the session or the day.

### ***While I have the floor***

So, what do you do when you're up there? I assume you know your content, so here are a few other things to remember:

- Smile!
- Get and keep their attention by using short anecdotes to make your points more memorable... but don't ramble.
- Establish eye contact with *all* participants. Work on making eye contact with a participant for 3 to 5 seconds or for the length of a phrase. Don't forget to vary your gaze and don't stare. Staring is intimidating and may be culturally inappropriate.
- Use their names. It shows respect and makes a person feel important and connected to the group.
- Vary activities and instructional styles. The average adult attention span for a single activity is only *eight* minutes, so don't labor a task.
- Move around the room. You know how a flickering television picture attracts your attention compared to a static picture on the wall? *You* should be the TV picture! Moving around the room also lets you check progress, give feedback, and help those who may be too shy to ask for assistance.
- Don't assume people are learning just because you're presenting. Ask questions to assess their understanding.
- Make use of your own strengths and knowledge. Keep in mind that you know much more about X than they do.
- If it is a whole day session, provide participants with candy, fruit, carrot sticks, or something similar around 3 p.m. to counter the post-lunch sugar slump.
- Focus on the audience, not the visuals. Visuals are only reinforcements of your verbal points, not a crutch for you to hide behind.
- Have fun!

### ***I'm speaking: use of tone and voice***

Another key factor that affects how people perceive you is your tone and voice. Being natural inspires trust and attracts people to you. Be who you are. Use your own

style and don't try and be something you're not; audiences can always smell a fake. Even though your natural style may not suit everyone, it *will* be believable. Your tone should be confident but not overbearing; you need to speak in such a way that you lets you convey confidence and knowledge of the subject matter, without coming across as authoritative or arrogant. Speak slowly enough for the audience to follow you, especially if you have an accent that differs from the majority—but don't drop into a monotone. Slow down or pause when covering important points; this verbally emphasizes to your audience that what you are saying is very important. Make sure you speak loudly enough so that everyone in the group can hear you. And remember that you are training, not giving a speech. One of the easiest ways to put off anyone is to read the complete set of course materials to them. For good examples of tone and effective voice usage, check out the national news anchors.

### ***Give me a break!***

Time is money in a training class. If you start the class late, you are wasting the participants' time and setting a precedent for them that the schedule is not important. Stick to any time schedule you announce, and start each session on time, even if there are only a few people in the room. Instead of telling them how long a break will be, tell them the exact time you will recommence (this avoids any confusion). Keep an eye on the time and make sure that you take breaks every 60 to 90 minutes so that participants can grab a cup of coffee, go to the restroom, make a phone call back to the office, etc. However, don't stop midway through a key point or topic to take a break—finish it first, or don't start it. For the first break of the day, remind participants where the restrooms and beverage facilities are. Vary the lengths of the breaks; the first break should be quite short as the training has just begun so their "needs" should be minimal, but for subsequent breaks allow 15 minutes. This allows them to take care of more time-consuming items, such as phone calls. By allowing them time to take care of their very important "outside" demands, they should be more attentive and focused when they return.

### ***Dealing with people***

It would be great to think that everyone came to your class with the same aim—to learn what you are there to teach them. However, sometimes they are there for different reasons, such as a mandate from their managers. And when they come into the room, they already come with baggage: experiences from previous training courses and memories of school that can create immediate negative reactions; personal issues; too much partying the night before; a propensity to be the class clown in any situation, and so on. While you can't change their situation, you can use some techniques to counter certain behaviors. Here are some:

- **Non-participants.** Ask non-threatening questions to draw them out. Example: Ask about a problem that occurs in their normal work environment and how their organization deals with it.
- **Hecklers.** Use their names and compliment them on their insight, or ignore them.
- **Challengers.** Thank them for their comments or questions and use the information to segue back to the topic, such as "As John just said, ..."
- **Sleepers, drifters, and dozers.** Schedule more "hands-on" activities; vary your voice; randomly move about the room. Change or shorten the activity. Also, watch the room temperature and air flow; if it's too hot or stuffy people will drop off to sleep. And if they had a heavy meal or alcohol at lunch, they'll be more inclined to drift off.
- **Monopolizers or know-it-alls.** You have a few options here: ask someone else for their input or opinion; ignore them and move on; or return the focus to the topic. They may revel in a leadership role so give them one.
- **Class clowns.** Ignore them – they are seeking attention and every time you acknowledge them, they get the attention they want. You might also try giving them a leadership role.
- **Talkers and chatterers.** Initially ignore them, if you can. However, at some point they must be stopped. The best way is for *you* to stop talking, stand at the front, and make eye contact with every person in the room one at a time. It may take a few seconds, maybe even a minute, but eventually the talkers will stop. If they start again, repeat this technique. Don't raise your voice or shout. If you choose to address the issue verbally, then make sure you state their name, the action you want to happen, and the consequences of not following that action.

Practice your responses to tough questions in advance, but remember that it's OK to say "I don't know". If you don't know an answer, don't bluff. If you're wrong you'll lose credibility with your audience. Say that you will find out and get back to them. At the next break, make a call to see if you can find out the answer, then give that information to the group after the break. If you don't get an answer, be sure to follow up with the participant after the training.

## **Delivery methods**

A good trainer will use a variety of instructional methods, techniques, and media. Sticking to only one method is boring for you and the participants. However, it is also off-putting to use too many. In addition to lectures, exercises, and discussions, you might like to try some of these methods:

- **Demonstration.** Participants observe a task being performed. For full attention, get them to turn their monitors off while you demonstrate the task.
- **Drill.** Repetitive practice.
- **Role Play.** Dramatization of a situation to apply what has been learned. Particularly good for

anything related to human interactions, such as conflict or change management.

- **Simulation.** Mirrors a real situation or task; can be based on scenarios or case studies.

**Lecture style sessions.** Lecture style is best used for presenting facts and explanations to a large group. But don't overdo it. You'll lose your audience very quickly if you can't make the material sparkle.

**Structure.** A structured approach may be helpful (especially as you are new to training), and it provides predictability for the participants, but don't overuse it. One structure that usually works well is the "why, what, how" pattern:

- **Why:** Explain why X is important / valuable / beneficial / useful.
- **What:** Explain what X is.
- **How:** Explain how X works/happens (spend most time on this section). This could also include **when** and **where** X would be used.

Don't forget to **summarize/review** at the end of a topic. Either you can do the recap, or, even better, get one of the participants to give a summary of what was just learned—warn them first. Choose your "victim" randomly. Thinking they might be called on next keeps them awake and on their toes, and helps them concentrate on what you're trying to teach them. Use questioning techniques to bring everyone into the group.

**Topics.** Reinforce the previous topic's information as you are delivering information about the next topic in the sequence. For example, "Remember how you just learned to ...? Now you're going to build on that by doing ...". Show exactly how to do a task before you get the participants to do it. Take each skill you teach and ask "How can you use or adapt this skill/technique to your job?" Software functions taught outside of a job context are meaningless to most people, so use real-world examples.

**Graphics.** Where your content can be explained in text or graphics, choose graphics every time. They capture the interest of your audience quicker than text. Graphics don't need to be elaborate: simple boxes, circles, perhaps a few words, are enough to convey a powerful message. (There are numerous resources available that list the "do's and don'ts" of graphics, especially for using Microsoft® PowerPoint slides, so they won't be covered in this paper.)

**Metaphorically speaking.** Where a concept is difficult to understand, look for a real-world example to explain it. This helps the participants "connect" with the content. An analogy with something as familiar as a car may be enough to get someone over a conceptual block.

**Boredom.** Keep your lecturing to a minimum and the exercises to a maximum. Some sources recommend that 60% of time should be spent on exercises; naturally, the nature of the topic will dictate the mix. Most participants want to get into the exercises as soon as possible, so don't leave it too long before they tackle them. Boredom can kill even the most brilliant course.

**Exercises and hands-on activities.** Exercises let participants learn while performing tasks, as well as provide feedback to the trainer. It is generally understood that people retain the most information when they actively use a number of their senses at the same time (e.g., sight, touch, hearing), and retain the least if they just listen. So include hands-on exercises in your training course whenever possible. As part of the exercises, encourage learners to take responsibility for their own learning by finding answers to their questions using resources such as the on-line help and the software manuals. Covering all the topics in the training manual is not as critical as making sure the participants can use the most important commands and functions. Don't sacrifice exercises for more content. Include extension exercises for those who finish quickly.

Exercises should be:

- Absolutely relevant to the learning objective.
- Tested, tested, and re-tested.
- Appropriate to the time frame allowed.
- Short.
- Challenging, yet possible to be completed successfully.
- Based on previous exercises, where possible.

**Discussion techniques.** While discussion may be trainer-led, it is not your job to do all the talking. This is the time for participants to air their views and contribute their ideas, no matter how oddball they may sound. Your role is to *facilitate* the discussion—get it started, keep it moving, and write their brainstorming ideas on the board. It is also your job to make sure that the discussion stays on topic, and that all participants join in. Your role in a discussion group is as a mentor and facilitator, not as the font of all knowledge. So hold back.

## Getting feedback

Feedback is important to you and to the participant. *You* find out what they thought of the course and your teaching style, and *they* get the opportunity to express their opinions and ideas. Feedback can be both formal (e.g., evaluation sheets) and informal (e.g., questions throughout the day, body language). It is an opportunity to learn more about yourself and to get an honest opinion about your teaching style from people you don't know. But remember: No matter what you do or how good you are, you can't please everyone all the time, so take criticism to mind but not to heart.

## The end!

Ah! The end of the day! But you're not quite finished yet. Allow at least 15 minutes for the wrap-up when you'll need to do at least some of the following:

- **Review** all the outcomes achieved.
- **Invite questions** from participants. Start with specific questions, then invite more general

questions about the course. If questions aren't forthcoming, ask your own questions of the group, such as the top three skills they learned, the top three areas where they need more practice, what they will take back and apply at their workplace.

- **Give contact details** of how or where you can be contacted if they have further questions (use business cards).
- Get participants to **complete evaluation sheets**.
- **Collect** evaluation sheets, name tag holders, etc.
- **Thank** participants for attending.
- **Remain behind** to answer any other questions that may be asked privately.
- **Clean up** the room and leave it better than you found it.
- **Return** all borrowed items and security passes.

With a selection of these tips and tricks up your sleeve, you should be ready to take on the challenge of conducting your first training course. You will develop your training expertise over time, but at least you can walk away from your first class knowing you did as good a job as you were able.

Remember, with good preparation you don't need good luck!

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