



# Training Away from Your COMFORT ZONE

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**B**ecause we often know the most about a software product, technical communicators are frequently asked to deliver training, even if that's not our main role. If you work at a large organization that provides software training, you're probably used to having one or more dedicated training rooms and a technician to prepare the equipment. Over time, trainers at such organizations become confident that all the hardware and software is set up correctly for their presentations, the training databases are installed, and, should anything go wrong, that some-

one can sort it out while they continue presenting.

But even seasoned trainers stumble when asked to train at another site for the first time. Training out of your comfort zone is where it gets challenging. Even if you make specific requests, never assume the client will meet them. You have to be self-sufficient, bringing with you everything you need. You need to be confident that the tangential, administrative details are under control, so that you can convey your information clearly and confidently.

So, if you are presenting in another location, how do you ensure that everything runs smoothly?

### Prepare Yourself

Checklists are your time- and sanity-saver. Develop and use checklists for all your preparatory tasks. While they can take time to set up, you can reuse them (with modifications as necessary) every time you deliver training at another location. The one I use is nothing fancy—just an undated Task in *Outlook* that I update as I find new items to add and others to scratch off. (Visit the Web at [www.cybertext.com.au/tips\\_training.htm](http://www.cybertext.com.au/tips_training.htm) to see a sample checklist.) Your lists should include the following items:

#### *Travel Arrangements*

As soon as you can, clarify who will make your travel arrangements—it's probably not you, but you'll need a contact name in case you have questions or something goes wrong. This person will need to book air tickets (with enough time between connections for security checks), hotels, rental cars, and the training venue (if it's not the client's site); organize catering; and clear you to use your company's corporate credit card if there is one. Send one copy of the itinerary to your client contact. If you're renting a car, you'll need maps to get from airport to hotel to the venue as efficiently as possible: Internet sites such as Expedia ([www.expedia.com](http://www.expedia.com)) and Mapquest ([www.mapquest.com](http://www.mapquest.com)) can provide detailed maps and driving directions, or you can pop into your local motoring association (such as AAA) and pick up maps for your destination. (You can find AAA office locations at [www.aaa.com](http://www.aaa.com).)

#### *Money*

You need to know "who pays for what" so that there are no surprises when you get to the client location. What travel expenses can you charge? Do you charge them to your company or the client? What do you have to pay for out of pocket and then claim back as a reimbursable expense? Which expenses are acceptable and which are classed as personal? (For instance, will your company spring for one alcoholic drink with dinner, or the whole mini-bar?) Know all of this before you leave.

Make sure that the credit card limit,

whether it's yours or the company's, is sufficient for all expenses. If you are travelling overseas, let your bank know the dates and destinations (including transit airports where you might buy duty-free goods), so an overseas transaction doesn't trigger an automatic stop on your credit card. This happened to me during a trip to California; fortunately, I had another credit card that was accepted, so I wasn't stuck in the United States for three weeks without funds.

#### *Contacts*

Know the names and emergency contact details of all the people you might need to get in touch with, including the IT gurus at your company and at the client site; your contact at the client's company; the person who made your travel arrangements; the airline; the hotel; the rental car company; the national help desk numbers for the equipment you are carrying; and quick-turnaround printing companies at the client location.

## Even seasoned trainers stumble when asked to train at ANOTHER SITE for the first time.

### Take It With You

The age-old question—what do I pack? Following are items you should add to your checklist:

#### *Luggage and Shipping*

To spare your back, get your company to invest in a wheel-along laptop bag as your carry-on luggage. Anything you don't need on the plane should go into your checked luggage; use zip-lock bags for small items so you can identify them easily. If you have to ship boxes of gear, print all address labels (including return address labels) before you leave. Put the labels in clear plastic sleeves to protect them and organize them so they are ready when you move to the next location. Pack tape to secure the labels.

#### *Computer Equipment and Data*

There are obvious items you need to take with you, such as a laptop and perhaps a data projector. But don't forget to take electronic copies of your presentation, manuals, and handouts as well—on CD/DVD, USB thumb drive, ZIP disk, or even floppies; keep these separate from your laptop so if your laptop is stolen, goes missing, or crashes, you've got copies of your materials. If you have to install software and databases at the client site, make sure you have these applications, that you know how to install them, and that you know the user IDs and passwords. Other computer peripherals to consider include a mouse, mouse pad (glass lecterns can't cope with the red light on an IntelliMouse), and an external drive or modem. Double-check the desktop icons and file folders on the company laptop to make sure they don't include anything offensive or confidential, especially when projected onto the big screen. If you need Inter-

net access for the training, get off-line copies of the sites in case the connection goes down in the middle of your presentation.

#### *Cables, Cords, and Other Accessories*

If you take a data projector, don't forget a spare lamp, the remote control (with spare batteries), and all the cords and cables to connect to your laptop and the power; know how to connect them and how to project the laptop screen onto the presentation screen. Don't forget all the other cords and cables you'll need—laptop, network, phone, and power (including a power strip, extension power cords, double adaptors, UPS, and international power adaptors if you are travelling overseas).

### Other Items

If you won't have time or access to print the materials when you get to the location, take hard copies of all training materials, plus a few spares. Your cell phone could be your lifeline if something goes wrong, so keep it charged and with you; throw in the battery charger too. Take a mini computer repair kit (Phillips and flat-head screwdrivers, scissors, penknife, etc.)—but don't put them in your carry-on luggage. Your client may forget to print a name tag for you, so take your own. Whiteboard markers don't take up much space, so throw in a few dark ones in case there aren't any at the venue, the available ones have faded, or the only ones that work are yellow!

### In the Room

Get to the venue early so you can deal with any unexpected "nasties" before they reflect badly on you. What's early? Probably anything between 30 and 60 minutes, assuming you can get access to the room and depending on what you have to set up. If you can get into the room the day before, that's great.

### Set Up the Room

The tasks you'll need to do before your audience arrives include the following:

- Set up your computer and projector.
- Install any software and databases on trainees' computers and check logins.
- Check Internet and network connections, if necessary.
- Check the room arrangement and adjust chairs and tables to suit your delivery style.
- Clean the whiteboard and make sure there is enough flip-chart paper.
- Write any introductory notes on the whiteboard.
- Find the bathrooms, public phones, and fire exits.
- Check the venue's rules for food and drink in the room.
- Check the catering arrangements.
- Make sure that you have plenty of water.
- Check temperature and lighting controls and microphone levels.
- Distribute training materials and evaluation sheets.



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- Tape down any loose cables and cords.
- Turn off your cell phone a few minutes before you are due to start.
- Take some deep breaths.

### Help! I Don't Have the Right Equipment!

Your worst nightmare: You planned carefully, you checked your lists, you took all you needed, but something *still* goes awry. You've got to think on your feet and be ready to improvise. For instance, let's say that you don't have enough computers for the hands-on training that you had planned—despite assurances that they would be provided. You'll have to quickly consider your options, which might include the following:

- Arranging for more computers to be brought in. (If you don't have time to set them up before the training begins, set them up during the first break so that you aren't holding up your audience.) This solution may not be feasible, but now you know why you have the cell phone numbers of the company's IT guru and your contact person at the company!
- Abandoning the "hands-on" training altogether and presenting a demo or walkthrough using your laptop and the data projector. If you do this, con-

sider rearranging the seating so that people aren't stuck behind blank monitors. You might arrange chairs in a "U" or semi-circle, or, if your audience needs writing space, you can put the computers on the floor at the side of the room and bring the desks together to make large work tables.

- Doubling up people at computers, swapping the active and inactive participants at a suitable break so that everyone gets a chance at the keyboard.

Your improvisations will depend on what resources are available, but no matter what decision you make, let the attendees know what you are doing and why. They'll evaluate you more fairly if they know why they didn't get what they expected.

### Finishing Up

After the training is over, collect the evaluation sheets, pack up your gear, and put the room back as it was. Return any borrowed materials and security passes to the venue coordinator. Check out of the hotel, return the rental car, get back on the plane, and breathe a sigh of relief that it all went well.

Finally, don't throw away those checklists. Revise them as soon as you can. Cross off anything that you can safely leave at home next time (like the extra pair of shoes that you packed, just in case you had time to go hiking), and update your electronic copy. With your brilliant preparation and high confidence, there will be a next time, won't there? Just think about where those frequent flyer miles will take you.... **i**

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