

Training the Trainer in a Comprehensive On-the-Job Training Program

by

Justin E. Groth

Field Project

Submitted in partial fulfillment of the requirements for the

Master of Science Degree in Education

Graduate Studies

Martin Luther College

New Ulm, MN

07/2021

Signature Page

Date: August 26, 2021

This field project paper has been examined and approved.

Review Committee:

Dr. Jeffery Wiechman, Chair

Dr. Kari Muent

Dr. John Meyer

Approved:

John Meyer
Director of Graduate Studies

Abstract

This field project focuses on the beginnings of an on-the-job training program at Dynamic Lifecycle Innovations. More specifically, this project reviews the development and implementation of a Train the Trainer course. This course was developed with adult learning practices in mind and serves as an entry for trainers into the on-the-job training program. Trainers were taken through the role and qualities of a trainer, working with adult learners, effective questioning, effective feedback and the on-the-job training program documentation. This course helped lay the foundation for on-the-job training at Dynamic which the on-the-job training team continues to build upon.

Acknowledgements

I would like to thank my family. My wife for continuing to push me to do, and be, my best. My daughters for their continued love and encouragement. My parents for never missing an opportunity to let me know how proud they are of me. I would also like to thank the MLC Review Team (Dr. Wiechman, Dr. Meyer, and Dr. Muent) for assisting me in a project that was apart from the regular field projects they oversee. Finally, I would also like to acknowledge the work of the on-the-job training team at Dynamic Lifecycle Innovations (Dale Zesiger, Audreana Royer, and Abe Ford) for all their time and effort in the program and continuing to make Dynamic a great place to work.

Table of Contents

Abstract	3
Chapter I: Introduction.....	6
Identify the Issue	6
Importance of the Project.....	7
Project Purpose or Goal	7
Chapter II: Literature Review.....	9
Introduction.....	9
Pedagogy versus Andragogy	10
Assumptions of Adult Learners	11
A Process Model for Adult Learning.....	12
Summary	14
Chapter III: Implementation	155
Introduction.....	15
Procedures.....	15
Assessments	18
Results.....	189
Chapter IV: Reflective Essay	20
Introduction.....	2020
Conclusions.....	20
Recommendations	22
References	25
Appendix A: Train the Trainer Slideshow/Facilitators Guide (ver. 4).....	27
Appendix B: Train the Trainer Workbook/Presurvey.....	46
Appendix C: Train the Trainer Assessment Form	61
Appendix D: Train the Trainer Assessment Results	63

Chapter I: Introduction

Identify the Issue

Dynamic Lifecycle Innovations is an organization that is on the verge of exponential expansion. The organization has grown from a garage startup to an employer of 250+ in 10 years. Dynamic has a strong culture which focuses on empowering team members (TMs) to better themselves and the world. Dynamic's culture serves as the backbone for many of the decisions made in our corporation. This led to the decision to establish a Learning and Development (L&D) department. Over the past few months, L&D has identified what it still needs to do to help the team members grow. The L&D director has determined to place the organization's primary focus in onboarding/on-the-job training, an Integrated Competency Framework, Continuous Professional Development, Leader Orientation/Training, and Career Paths/Ladders. The on-the-job training process will be L&D's primary focus over the coming months.

Dynamic is split into two departments. The first department, nicknamed DUO for its dual role of recycling and recovering material, focuses exclusively on scrap electronics material that will be broken down and sent to other vendors to be reused or recycled. The material that moves through DUO is sorted into the proper commodity. Some of these commodities (such as printers, A/C units, and dismantled laptops) may even be shredded and separated into their core components (plastics, green board, copper, etc.) The other department, Information Technology and Asset Disposition (ITAD), is a production heavy department with very specific processes and procedures for testing and refurbishing of each type of commodity. These commodities include desktops, laptops, servers and a variety of other electronic units.

Each team member must follow written process and procedures to ensure customers are purchasing the highest quality product. These processes vary from operating machinery to the specific steps necessary to test and refurbish resale units. The high standard of quality is important to the customer as the team is guaranteeing the destruction of data from the clients we receive material from and the assurance of the functioning unit for those Dynamic is selling the refurbished unit to. The issue that presents itself is in the training of new team members in these processes. These new team members may be new to the company or coming from another department. The training relies heavily on quick reviews of the processes and the passing down of “tribal knowledge” with no formalized structure to the training processes. Therefore, the need for formalized training processes presents itself, which includes training of the trainers.

Importance of the Project

Dynamic holds itself to a higher standard. This shows itself in our many certifications such as ISO-9001 which assures our customers that they are receiving the highest quality product. This certifications depends on well-maintained process documentation and certified training in each process. Using non-uniform training practices and passing knowledge through word of mouth instead of through the process steps in the approved process documentation leads to inconsistent quality in our product. Employees are confused when transferring between departments and turnover from team members being “thrown into the deep end.” This, in turn, may result in loss of these certifications, clientele, and material.

Training team members in a specific and easy to follow process for their particular role in the company will help prevent inconsistencies in how team members process units and input data. Dynamic’s customers expect to receive what the inputted data tells them they will receive. Inconsistency leads to lower quality, which directly quality.

The resale division is also made of various departments, each dealing with its own commodity (desktops, laptops, etc.). A smooth transition between these departments and supervisors will encourage team members to continue to become knowledgeable in multiple commodities. They will be able to be flexible depending on the type of work that needs doing on any given day.

Finally, turnover due to improper training is a real concern. Onboarding can be an exciting yet stressful time. A fully developed training program with knowledgeable trainers will make for a smoother introduction to their department. This will in turn help new team members feel their introduction is at a pace that will allow them to succeed.

Project Purpose

The purpose of this field study is to investigate and develop a comprehensive train the trainer program based on current adult learning practices. A comprehensive training program must begin with the development of training materials, including training manuals and trainee checklists. The organization will use this training material to develop the Train the Trainer course. Trainers will participate in a Train the Trainer course to learn how to work with adult learners and develop a clearer understanding of the organization's training structure. Finally, the organization will develop an on-the-job training lab to serve as a safe and functional area for trainers to work with their trainees. This lab will serve as the next step in the comprehensive training program but is beyond the scope of the Train the Trainer course.

Chapter II: Literature Review

Introduction

The intent of this project is to develop, implement, and improve upon a Train the Trainer course that would serve as a stepping stone into an on-the-job training program. The core of this program is to develop an understanding of the adult learner. This literature review provides insight into how adults learn as well as the concepts that need to be incorporated into a comprehensive on-the-job training program.

Pedagogy versus Andragogy

The classroom and the workplace may have many similarities. This may also be the case for adult learners as well as children. Overall, every setting and every learner is unique. Each learner, young and old, will have differing needs. It is important for the trainer to understand these needs in order for an adult to feel motivated to learn. A well-structured, practical, and collaborative learning experience is needed in order for the students to have the best learning outcomes (McCall et al., 2018).

Pedagogy, the art and science of teaching children, was at the heart of learning and education going into the 20th century. Most learning theory and assumptions about learners revolved around children and how they learned best. The transfer of knowledge and skills was core to what was being taught in classrooms, whether children or adults. Those teachers of adults was finding difficulty with this method in the 1920s. Knowles (1980) observed that adults had become “resistant frequently to the strategies that pedagogy prescribed, including fact-laden lectures, assigned readings, drill, quizzes, rote memorizing, and examinations. Adults appeared to want something more than this, and drop-out rates were high” (p. 40).

The theory of adult learning began to take hold post-WWII going into the 1960s. Researchers found that adult learners were seeking out learning opportunities on their own outside of educational institutions. Adult learners tended to follow similar steps in their learning and looked to teachers as guides and helpers more than sages. American educator Malcolm Knowles gathered these studies from the first half of the 20th century and used the word andragogy to describe his theories for adult learning. Russo (2016) highlights the work of Malcolm Knowles, a pioneer in the field of adult learning, and says that adult learners:

need to see the relevance of the training to their own life experience; learn best when they have a measure of control over their learning experience; like to apply their own experience and knowledge to the learning; benefit from task- or experience-oriented learning situations; learn best in cooperative climates that encourage risk-taking experimentation. (p. 3)

Assumptions of Adult Learners

These best practices in adult learning revolve around the assumptions about adult learners that vary from those of child learners. The first of these assumptions is that adult learners need to understand the why in what they are learning. There is a deeper sense of commitment that happens when the adult learner comprehends the benefits of learning the material. This goes hand in hand with the adult learner's sense of self concept. Adults become responsible for themselves over time and "develop a deep psychological need to be seen by others as being capable of self-direction" (Knowles et al., 2015, p. 44). This may cause some learners to flee from learning or training situations for the fear that their own decision making may become restricted or limited.

Another assumption is that adult learners have a wealth of their own personal learning experience when coming into a learning setting. This experience varies from person to person and group to group. The experiences of the adult learner focus more on the past as compared to a child learner whose experience is shaped by the here and now. This past experience may prove itself to be both a benefit and a hindrance. The benefits include the ability to learn from one's peers as well as using learning techniques that draw on that experience – such as case studies and simulation. The hindrances include the “mental habits, biases, and presuppositions that tend to cause [adult learners] to close [their] minds to new ideas, fresh perspectives, and alternative ways of thinking” (Knowles et al., 2015, p. 45). Adult learners should be led to examine these habits and biases to allow for openness as they move forward in their learning. The instructor should also be aware of their “students’ prior experiences and connect them with new instructional topics” (McCall, Carlson, Padron, 2018, p. 40) that are relevant to their instruction.

The final assumptions revolve around the motivation of the adult learner. These motivations include a readiness to learn and the adult learner's orientation to learning. These both focus on the life centered opportunities and problems a learner may be looking to address. An adult's readiness to learn comes from their current developmental stage and what is needed to move onto the next. For example, you would not expect a newly hired deckhand to begin learning what is needed to captain before learning about everything they can about the ship itself. The deckhand will more actively pursue this opportunity to learn and be more prepared after years of experience and having the knowledge needed to move to the next level. Adults are also more greatly motivated to learn when they have a perceived understanding that the learning will assist them in solving a problem that they are facing in their own lives. This life-centered

approach to learning varies differently from the subject-centered learning that was the focus of their youth.

A Process Model for Adult Learning

The Andragogical Process model takes these assumptions of adult learners and turns them into a set of procedures that an instructor of adults can follow. This is opposed to the content model which has the instructor imparting a body of content to the students. “The difference is not that one deals with content and the other does not; the difference is that the content model is concerned with transmitting information and skills, whereas the process model is concerned with providing procedures and resources for helping learners acquire information and skills” (Knowles et al., 2015, p. 51). This process model for adult learning involves eight elements.

The first element is preparing the learner for self-directed learning. The concept of self-directed learning is a staple for adult learning. Yet many adult learners may be unaware of how to direct their own learning, having been subject to content learning most of their lives. Adult instructors should then take the time to work with adult learners on how to approach self-directed learning. This could include many strategies from having learners read and research material ahead of time to working with learners on identifying their skills and background knowledge to better build out the learning experience for each individual learner.

The second element is establishing an environment conducive to learning. In order to help grow confidence, instructors should pay close attention to the physical setting, providing the necessary resources, and addressing the interpersonal needs of the learner. The instructor provides a physical environment that does not distract from the learning but instead provides a positive reaction to anyone entering the room, putting them in a better state of mind for the

learning experience. Resources – such as computers, journals, and A/V equipment - in the classroom should be plentiful and ready to use. An instructor who provides all necessary resources allows for the learner to use them organically. Finally, the interpersonal needs of the learner are met when the instructor provides a safe-learning environment. “The classroom should be an emotionally safe and sympathetic space for learning where adult students feel encouraged by the instructor and by each other, and are free to ask questions and admit difficulties” (McCall et al., 2018, p. 37).

The next three elements focus on the instructor creating a mechanism for mutual planning, diagnosing the needs for learning, and accessing those learning needs (or discrepancies). These elements stress the importance of the self-directed nature of adult learning. The instructor should put mechanisms (practices) in place that allow for the learner to have a say in their own education. Adult instructors can put together planning groups involving learners or other stakeholder in the organization. The learners will feel a deeper sense of commitment to the learning. The needs of the individual, organization and society can be more thoroughly examined during the planning. This too allows the learner to have a deeper understanding of the why to what they are learning. The planning group will then be able to assess those discrepancies and better plan for instruction that is built on these learning needs. The adult learner, when involved in this process, will also better identify what they need to do in order to achieve their learning goals.

The final three elements dictate what is needed to create the program itself. These include formulating program objectives, operating the program, and evaluating the program. Ideally, for a program to be self-directed by the adult learners, objectives should be made in partnership with the adult learners. This is easier to do in when the process is the focus as opposed to training, in

which there are set behavioral objectives that need to be met. Adult learners must be able to identify the need for the objectives to be met in either scenario in order to more thoroughly commit to the learning experience. The steps of operating and evaluating the program fall to the instructor. The instructor's skill in creating and facilitating learning content that meets the predetermined needs of the learner is critical. The content and learners themselves must be evaluated with both quantitative and qualitative measures. These evaluations take place during the program, immediately following the program, and in the day to day performance of the adult learner over time. This is not simply limited to surveys and tests (quantitative) but also reaching out to the adult learners on a human level, finding out how their behaviors, thoughts, and feeling have changed (qualitative).

Summary

The research reinforces the importance of understanding adult learners. Adult learners are motivated to learn when there is a sense of control over their learning. They should have the opportunity to apply their prior knowledge to learning experiences that are both timely and relevant. Their motivation comes from an understanding the "why" of their learning experience and being able to apply their knowledge to solve life-centered problems.

Instructors are responsible for building a program that is based on the learning needs and wants of the adult learner. The instructor should find ways to involve the adult learners in determining the needs of the program. This helps to motivate the adult learner and helps them to better make the connections necessary to grow in their learning should also build a safe learning environments where learners are encouraged to ask questions and experiment. Qualitative and quantitative measures should be administered and shared with the adult learner throughout so the instructor can make necessary changes to the program and the learner can see their growth.

Chapter III: Implementation

Introduction

A compressive on-the-job training program is essential for any organization that strives to put bettering their team members front and center. This program provides trainers with written process, trainer's manuals and trainee checklists for their core process (i.e. Desktop Testing, Shredder Operation) in order to fulfill the organization's mission of growing the trainer and the trainee. This attitude has helped to push on-the-job training to the forefront of their current active projects. This chapter includes an overview of the on-the-job training program the structure of the Train the Trainer course, and the future state of both.

Procedures

Dynamic brought the on-the-job training project to the forefront in July 2019. A team was put together that consisted of the L&D Director and Operations Coordinators in both divisions. The Lead Trainer from another branch was brought over at a later date. The team began by developing the overall structure of the on-the-job training program. A Learning Management System (LMS) was purchased at this time. This would be used to manage trainer progress. Trainer's manuals and trainee checklists were developed for every operations department in both divisions with the assistance of process experts and newly certified trainers.

The ITAD Operations Coordinator was then tasked to build the Train the Trainer program in conjunction with newly developed training structure. The course was built with adult learners in mind and utilizing elements of the Process Model in its development. The first two elements utilized were assessing the needs for learning program and formulating program objectives. This was done by creating a mechanism for mutual planning with the stakeholders in the on-the-job training program. This included discussions with department managers,

supervisors, and process experts would participate in the course. The assessments given by this group helped determine the framework of the course. The learners were not involved in this initial planning process but they would be given the opportunity to provide feedback in their evaluation of the program. This feedback would later assist in the development of additional Train the Trainer courses that would directly take into account the needs of the learner. The team determined that the program objectives that met the needs of the trainers would include understanding the trainer's role and qualities, characteristics of adult learners, safe learning environments, effective questioning techniques, and high-quality feedback. Assessments needed to be developed.

The course was constructed with the assumptions about adult learners in mind. The importance of utilizing an adult learner past experiences is a factor in designing any adult learning experience. The participants were given the opportunity to share their past experiences with the facilitator in the form a presurvey and with an icebreaker activity which provided the facilitator and the other learners the learners' prior experience as well as any background in training they may have had. This allowed for some adaptations to be made in the course and allowed for the facilitator to adapt to the learners needs in regards to how the course was presented. This also gave the opportunity for other learners to draw on other learner's experiences.

The structure of the course took adult learning into consideration in other ways as well. The learners were presented with the reason they were there – to help them understand the “why.” This was done with an overview of the on-the-job training program by the L&D Director. This was designed to help create that deeper sense of commitment for their learning and why they were there. The learners were then introduced to the concepts that were determined early by

the team which included the role and qualities of the trainer characteristics of adult learners, safe learning environments, questioning techniques, and high-quality feedback. There was content-based learning that needed to be done throughout the training. Assessments were delivered throughout each of the sections to give learners the opportunity to reflect on their learning. These assessments included quizzes, a learning style inventory, and group activities that focused on asking questions and giving feedback. The importance and relevance of what they were learning and how they could utilize these skills was stressed throughout. The adult learner is motivated when the content provided is relevant, timely, and life-centered. It was important for the learner to understand how growing in their role as a trainer would give provide a richer learning opportunity for both their trainee and themselves. The final content-based section of the training was a general review of the on-the job training tools (process trainer guides, trainee checklists, and the Learning Management System) which was completed by a member of the OJT Team.

The ITAD Operations Coordinator would serve as the first facilitator for the course. The process experts would become the lead trainers in each department. Managers and supervisors would use the course to further their knowledge about how to better onboard and develop their team members. The facilitator would develop the course and introduce the lead trainers to the above concepts over a six-hour course. The course was facilitated in a training room designed for large group training. The facilitator would lead a majority of the course with the L&D director introducing the team to the importance of a structured on-the-job training program and another team member assisting as needed. An average of a dozen learners attended each session allowing for small group and large group work. A facilitator led presentation was created for each of the concepts along with a learner's guide which included an overview for the learners as well as the opportunity for them to take notes.

The culmination of the course came in the form of an activity which allowed trainers to team up and utilize their training skills at the end of the course. The first activity that was trialed included teaching code to solve coded arithmetic problems. This did not relate to their roles in the organizations. The learners also had difficulty learning the concept well enough to teach it in the short time frame established. The final project was re-evaluated and it was determined that a key assumption of adult learners was not taken into account – making the learning relevant to their current role. The learners' disinterest in the coding activity stemmed from that fact that there was no direct correlation to what was being done in their day to day job. There was a lack of satisfaction that stemmed from this. A life centered approach needed to be developed. The final activity evolved into an opportunity for each trainer to conduct a mini-training of their process on the floor. Learners were given packets the day before which included their process, trainer's guide, and trainee checklist. The trainers then broke into groups of three and were able to train to a specific aspect of their process or provide their trainees with a general overview within a 15 minute time frame. This allowed for the learner to practice skills that were directly related to their learning and assist them in progressing to the level of trainer.

Assessments

Few formative assessments were delivered during the course. Participants were asked to complete a survey and KWL at the beginning of the course, assessed for comprehension throughout, and given a survey following the course to help provide feedback. Appendices B and C contain examples of these assessments. The survey and KWL were reviewed by the facilitator prior to the course.

This provided the opportunity for the facilitator to adapt learning to meet the individual learner's needs based on their prior experience. This also gave the learners the chance to reflect

on their own learning. The comprehension assessments including quizzes and small group discussions helped to provide the learners a chance to explore the “why” of what they are learning.

The final survey allowed for the learners to give feedback. This feedback could then be used to improve the course and making it even more learner centered. Participants would later meet with members of the on-the-job training team on a regular basis to review best practices and determine improvements that need to be made with their department’s training materials. Input collected from these meetings could be used to improve upon and expand the training material as well as the Train the Trainer program. These meetings did not take shape though due to Covid-19 protocols that were implemented soon after the Train the Trainer course was initiated.

Results

I facilitated five Train the Trainer session over the span of a year. There were no formal assessments within the course itself. I did ask that all team members complete an evaluation form at the end of the course ranking various aspects of the course as well as any suggestions they may have had for improving the course. Participants were asked to rate the following questions about their training from 5-Excellent to 1-Poor. The average scores for each session and suggestions can be found in Appendix D. The purpose of the questions focused on course delivery rather than the adult learning assumptions and the process model laid out in the literature review. The team was able to make some adjustments that are reflective of these principles based on the feedback given. This included a retooling of the final activity to make it relevant to the participants, some general changes to the structure of the course, the amount of time taken, and the relevancy of some of the topics to their learning needs.

Chapter IV: Reflective Essay

Introduction

The intent of this project was to develop, implement, and improve upon a Train the Trainer program that would then serve as a stepping stone into an on-the-job training program. I have enjoyed taking the time to build the program. More so, I have enjoyed working with the trainers and beginning to guide them on their journey. The Train the Trainer course and on-the-job training will continue to change and adapt throughout my time at Dynamic and beyond. The ability to empower our team to better themselves will remain at the core of any change that may happen.

Conclusions

I have learned much from the onset of this course to where the course currently stands today. A comprehensive and structured on-the-job training program is necessary for our company to truly grow. More importantly, this on-the-job training program will help us to succeed in our mission of growing our team members professionally and personally. I have experienced this myself as I have gone on the floor and worked with trainers. Their excitement to serve others is infectious. I can only hope that this training mindset continues to spread throughout the company.

There was much that I learned while both designing and facilitating the course in regards to building for and working with adult learners. There is a strong emphasis put on learner involvement in the planning process for the learning experience itself. I should have found more opportunities to involve the adult learners themselves earlier on rather than just relying on their feedback following the course. There were complex activities that, if previewed with the learners beforehand, would have more than likely been replaced with more applicable activities. The

learners wanted more opportunities to use what they know and additional activities could have been crafted to their past and current experience.

I also learned that a facilitator, much like a trainer, must structure training to the needs of the adult learner. It is important for the facilitator to take every opportunity to understand the learners' past experience so that the course can be tailored to fit their learning needs. I received KWLs from the learners ahead of time and learned a bit of their past. I did not take the time though to thoroughly review the information and adapt the course accordingly.

The facilitator should also find as many opportunities to gather input from the learners before, during, and following instruction so that a sense of ownership is created for the learner. Motivation for the adult learner also stems from a clear understanding of why they are learning and how this learning will benefit them in solving life problems. I could have taken more time at the beginning to identify those problems with the learners and used the time to work together and address them.

The participants feedback during and after the course guided my review of the format of the course and adapt accordingly. The initial structure of the course did not take into account the need for breaks in the learning nor were the activities as relevant to what a trainer would experience on the floor as they could have been. These changes allowed time to visit the on-the-job training lab in progress as well as the removal of the non-work-related training activities. This then created the opportunity for mini-training session of the actual process on the floor. Feedback from the team members was far more positive when they had an activity that was relevant and timely to their current role. They were also given the opportunity to learn from one another.

Covid-19 adaptations also meant the Train the Trainer had to go virtual with smaller groups. These adaptations made me rethink the structure and facilitation of the course. Virtual instruction also pushed for the re-evaluation of the activities and their usefulness. I have grown to appreciate the earlier sessions in which I facilitated in person. The social aspect of this course is lost through a Microsoft Teams meeting. I am looking forward to future sessions will allow for us to get together in the same room so we can learn and grow together.

Recommendations

I will continue to adapt and grow the Train the Trainer program as the on-the-job training over my time with Dynamic. These recommendations include:

Regularly scheduled follow-up meeting with trainers. Adult learning is life centered. Adult learners' roles, responsibilities and priorities are constantly changing. The need remains for adult learners to be reminded how what they are learning or have learned assists them in addressing any problems they may face. The team should create a regularly scheduled meeting (once every three weeks) where small groups of trainers can get together and discuss success stories, opportunities, and learn from one another. The on-the-job training team can also use this as an opportunity to get feedback from the team. The feedback provided is important for any process model as it will provide the team with a clearer picture of the learning needs of the participants.

Providing trainers with more tools for their toolbox. The process model for adult learners is cyclical. Facilitators may notice that particular needs are not met in the first iteration of a learning experience. These needs can be met by providing additional learning experiences outside of the core course. The on-the-job training team can put together mini-modules that can be shared with small groups of trainers on a regular basis.

These sessions are also providing the opportunity for trainers to bounce ideas off of one another and grow together. These tools will help the adult learners take their next step into their next developmental stage.

Creating online courses in the Learning Management System to house additional material. Adult learners thrive in a self-directed environment where they can determine what is needed for them to grow. The six hours training course is not enough to cover all the material available. The mini-modules mentioned previously can be folded into the original Train the Trainer course so future trainers can have a more robust course before becoming a trainer. The trainers could use these modules to better themselves and address any problems they may have at their own pace.

Formal assessment of trainers on the floor. The process model for adult learning calls out the need for assessment of the training program. This allows for the facilitator to determine what needs may not be addressed in the current state. The adult learners need to be evaluated in order for this to be done. Measures of improvement in the adult learners will help to identify gaps in the training and strengthen future courses. These evaluations will also help the adult learners to identify where they need to grow and assist them in their own self-directed learning journey. There is currently little to no formal observation of training during or after the course. A formal evaluation process would need to be developed and implemented in order to accomplish this. This could be done by members of the on-the-job training team with a newly developed evaluation guide. The opportunity for learners which to have positive reinforcement and meaningful guidance should motivate them to continue to grow in their learning.

Establish a formal Trainer role in the company. Adult learners are motivated when they find the learning experience to be meaningful to their own growth and development. This includes the internal motivation of wanting to achieve learning goals and the external motivation to take the next step whether it be additional responsibilities or a promotion. Those assigned as trainers are currently doing so without any type of incentive. They are asked to give up production time to spend working with trainees and attending meetings. A formal Trainer role would allow for a certain percentage of their time to be dedicated to onboarding new team members, cross-training current team members, and working with trained team member to help improve current processes. This incentive would hopefully deepen the commitment of the learner to the process as they better realize the tangible benefit to the instruction.

Overall, Dynamic is still in the early stages in development of an on-the-job training program. There is a need and a want to see it succeed. This will not be possible without the dedication of our trainers and the on-the-job training team. We may have a long way to go but a servant's heart will help to continue to drive our mission – empowering our team members to better themselves, their families and others.

References

- Khan, R., Khan, F. & Khan, M. (2011). Impact of training and development on organizational performance. *Global Journal of Management and Business Research*, 11(7), 63-68.
https://www.scirp.org/pdf/JHRSS_2015120716263730.pdf
- Akdere, M., & Schmidt, S. W. (2008). Employee perceptions of quality management: Effects of employee orientation training. Academy of Human Resource Development International Research Conference in the Americas. <https://files.eric.ed.gov/fulltext/ED501643.pdf>
- Biech, E. (2009). *ASTD's ultimate train the trainer*. ATD.
- Cole, M. (2017). Onboard, engage, and develop: How organizations improve effectiveness. Alexandria, VA: Association for Talent Development.
- Gauld, D. & Miller, P. (2004). The qualifications and competencies held by effective workplace trainers. *Journal of European Industrial Training*, 28(1), 8-22.
https://epubs.scu.edu.au/cgi/viewcontent.cgi?article=1023&context=gcm_pubs
- Kerka, S. (2002). *Teaching adults: Is it different? Myths and realities*. Office of Educational Research and Improvement.
- Knowles, M. S. (1980). *The modern practice of adult education: From pedagogy to andragogy*. Association Press.
- Knowles, M. S. (1984). *The adult learner: A neglected species*. Book Division.
- Knowles, M. S., Holton, E. F., & Swanson, R. A. (2015). *The adult learner: The definitive classic in adult education and human resource development (8th ed.)*. Routledge.
- Lawler, P. A. (2003). Teachers as adult learners: A new perspective. *New Directions for Adult and Continuing Education*, 98(1), 15-22.
<https://onlinelibrary.wiley.com/doi/epdf/10.1002/ace.95>

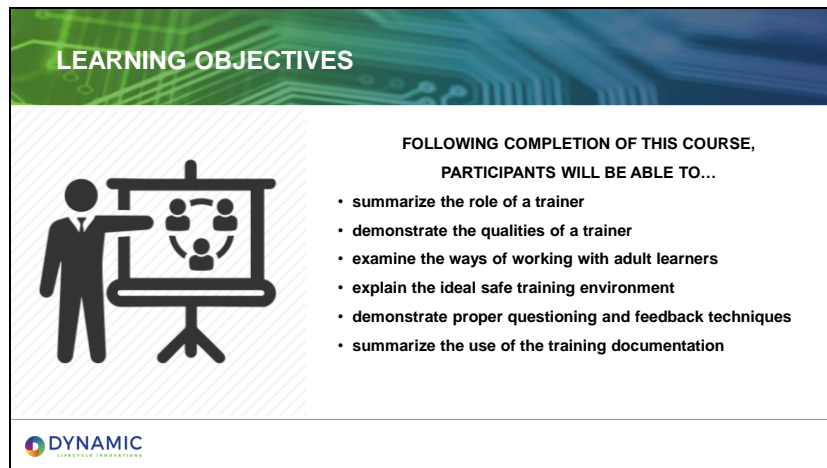
- Lawson, K. (2016). *The trainer's handbook* (4th ed.). John Wiley & Sons, Inc.
- McCall, R., Carlson, K., Padron, C. (2018). Evidence-based instructional strategies for adult learners: A review of the literature. *Codex*, 4(4), 29-47.
https://academicworks.cuny.edu/cgi/viewcontent.cgi?article=1048&context=bx_pubs
- Merriam, S. (2001). Andragogy and self-directed learning: Pillars of adult learning theory. *New Directions for Adult and Continuing Education*. 2001(89), 3-14.
<https://www.scribd.com/document/217631376/Andragogy-and-Self-Directed-Learning-Pillars-of-Adult-Learning-Theory>
- Paat, G. & Rumokoy, F. (2105). The comparative analysis of employee performance before and after training at Bank Indonesia in Manado. *Journal Riset Ekonomi, Manajemen, Bisnis Dan Akutansi*, 3(3), 189-199.
<https://ejournal.unsrat.ac.id/index.php/emba/article/view/9341/8916>
- Russo, C. S. (2016). *Basic training for trainers*. Association for Talent Development.
- Rothwell, W. J. (2020) *Adult learning basics* (2nd ed.). Association for Talent Development.
- Smith, P. (2018) *Learning while working*. Association for Talent Development.
- Wlodkowski, R. J. (2008). *Enhancing adult motivation to learn: A comprehensive guide for teaching all adults*. Jossey-Bass.

Appendix A: Train the Trainer Slideshow/Facilitators Guide (ver. 4)

Slide 1



Slide 2



Slide 3



INTERVIEW ICE BREAKER: We will give each of the TMs with a list of questions. They will pair up with a list of unique questions to ask the other TM. The goal is to try to get a story from the question as well. They will do this for 2 minutes and then switch.

NOTE: Use the review time to create seating chart for the session.

Slide 4



Slide 5

WHY?

- Team member commitment develops from opportunities to learn and grow
- OJT will provide a foundation for this
- Loosely restructured OJT creates risk to:
 - Productivity
 - Safety
 - Quality
 - Engagement
 - Retention
 - Teamwork

DYNAMIC
LIFECYCLE INNOVATIONS

Slide 6

WHAT?

- Institutionalize quality by creating a program that is:
 - Timely
 - Structured
 - Evaluated
 - Consistent
 - Human Throughout

DYNAMIC
LIFECYCLE INNOVATIONS

Slide 7

HOW?

- Build Confidence with TMs
- Provides Formal Instruction
- Reinforces the Training
- Applying to Real Work
- Supporting Continued Learning and Growth
- Trained Trainers aka YOU!

DYNAMIC
LIFECYCLE INNOVATIONS

Slide 8

WHO?

- Dale Zesiger – L&D Director – Project Lead
- Audreana Royer – Operations Administrator – DUO Team
- Justin Groth – Operations Coordinator – ITAD Team
- Abe Ford – Lead Trainer - TN
- Alicia Suessmith – People Ops VP – Project Sponsor

DYNAMIC
LIFECYCLE INNOVATIONS

8

Slide 9

TRAINING FOR SUCCESS
ROLE OF A TRAINER

DYNAMIC
LIFECYCLE INNOVATIONS

Slide 10



SAY: As trainers, we look to build confidently competent team members. Competence is the ability to do something well. Competence is built by training KSA (Knowledge, Skills, and Abilities) for a given process. KSA is:

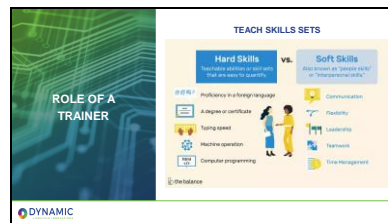
Knowledge – the subjects, topics, and items of information that an employee should know at the time he or she is hired or moved into the job. Knowledge represents bodies of information that are applied directly to the performance of work functions.

Skills – technical or manual proficiencies which are usually learned or acquired through training. Skills should be measurable and observable.

Abilities – the present demonstrable capacity to apply several knowledge and skills simultaneously in order to complete a task or perform an observable behavior. Abilities may also relate to personal and social attributes which tend to be innate or acquired without formal instructions. Abilities are enduring talents that can help a person do a job.

DO: Go to board and list KSAs of Dynamic positions based on a actual role of participants in of KSAs as they are determined by participants

Slide 11



SAY: As an OJT trainer, you are there to teach particular skills sets. The hard skills are easier to identify. These will include inputting data into the ERP, using a drill to disassemble a device, or sorting through materials and identifying focus material. We are training to a process and, more often than not, this process is made of hard skills.

Soft skills are those that are not commonly trained directly, but they will be reflected through you as you

demonstrate them as a trainer. These may include (but are not limited to):

Communication – open and honest

Leadership – gradually give more and more responsibility while serving as guide on the side

Critical thinking – give opportunities for TM to work through problem

Listening – give 100% of your attention, expect 100% of theirs

Adaptability – create scenarios in which the unexpected happens

Organization – demonstrate 6S throughout

Slide 12

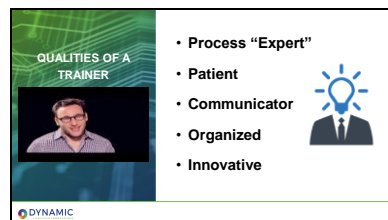


SAY: The trainee needs to understand what the path to success looks like and you are there to lead them on their way. You are the determining factor for the trainee moving from in training to trained. The tool for this will be the trainee checklist – a document you and the trainee will walkthrough and talk through together. We will be reviewing this later on today.

Slide 13



Slide 14



SAY: What qualities makes for an effective teacher or trainer? In the following video, Simon Sinek tells us what quality he feels makes for the best teacher.

DO: Play video

from your trainee's questions or comments.

SAY: Process Expert - Your "expertise" should come from a knowledge of the why and how in your particular process. You will never be an absolute expert in your process, though you should consistently be striving to become one. Do not hesitate to learn

Organized - Take time to plan your training materials and facilitation delivery carefully. Well-organized lessons and materials help you to remain focused on the topic at hand, instead of jumping around. This prevents facilitated sessions from

Patient - A good listener is a patient listener. Listen for what the trainee thinks they need to better determine what they actually need. Your ultimate goal is to be able to meet these needs

Communicator - As mentioned earlier, communication is open and honest. Trainers must foster a learning environment in which trainees feel comfortable taking risks and asking questions without the fear of ridicule. Such an environment depends on the trainer's ability to create open lines of communication. Trainers must be not

only able to explain tasks and procedures clearly, they must also know how to listen actively and be sensitive to the importance of body language and nonverbal communication. Good communication skills is an absolute must for effective training

becoming dragged out and losing the audience's attention.

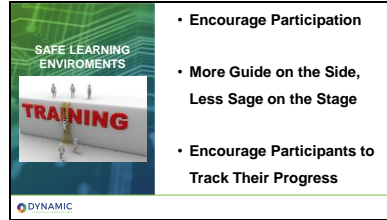
Innovative – Organization will get you so far. Trainers should also be ready to adapt at a moment's notice as they are working with a variety of learners.

DO: Ask the participants to give on example of a trainer in their lives that has demonstrated (or not demonstrated) one of these traits and how it is affected the training (either positively or negatively

Slide 15



Slide 16



SAY: Your role as a trainer is not to simply regurgitate the information that the trainee can simply pick up and read themselves. You are there to serve as a guide on their journey from becoming a trainee to becoming trained. Your personal experience and expertise are key for you to be adaptable. Be ready to acknowledge and address those questions that trainee may have, helping guide them to the correct answer.

SAY: The trainee checklist will help provide the trainee with a clear path. Lay out the path you will be taking them on at the beginning. Each step will need to be explained, demonstrated, observed, and assessed by you. Explaining the steps before attempting them will help the trainee will help to create a more motivated classroom.

SAY: A safe learning environment is essential in establishing an atmosphere of trust. The trainee will have a sense of ownership in their training process as well. You, as a trainer, can foster this by first of all encouraging participation in the process. This can be done by increasing interactive activity during the training. Attention spans are not long and people generally start to tune out after 10-15 minutes. Create opportunities for the trainee to have a hands-on experience or take a moment to insert an individual or team activity.

NOTE: Quiz will be printed out, collected and reviewed for now.

DO: SOCRATIVE QUIZ –

WEBSITE:

<https://b.socrative.com/login/student/>

ROOM NAME: DLITRAINTHETRAINER

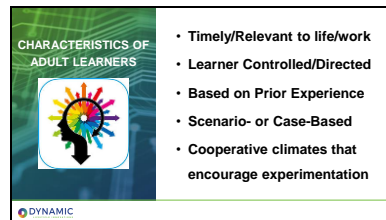
Distribute laptops and have TMs log into above website with credentials listed above.

Login to teaching portal (<https://b.socrative.com/teacher/#import-quiz/41296725>) and begin quiz. When completed, download the pdf report and review answers with TMs.

Slide 17



Slide 18



SAY: Relevant - The trainees that you are working with our here (hopefully) because they want to be. This principle is not about why your trainees are here, but about why each thing you teach them is an important part of the learning. **Ask the participants to briefly describe their role. Work through as a group to determine relevancy of particular steps of the process stressing the WHY? for particular steps**

Learner Controlled - Providing a completely learner controlled (or self directed) environment in many of the departments is going to be difficult at times as there are very specific steps that need to be taught directly. Providing the trainee with the objectives ahead of time and adjusting your training to match their preferred learning style will help you become a facilitator of

learning, ready to be tapped as required by the learner.

DO: DISTRIBUTE AND DISCUSS LEARNING STYLE INVENTORY

SAY: A few other items to take into account is that adult learner respond well to training that is:

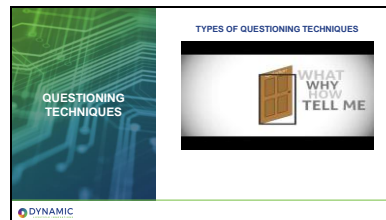
Based on Prior Experience - Adult learners also bring years of previous knowledge and experience to the classroom, as well as an established system of values and beliefs governing their thought They expect to be treated as adults. Find ways to connect with them in order to better determine how better to run through material. Trainee's prior experience may effect how you approach training certain steps in the process.

Scenario- or Case-Based – Discussion of labs and hands-on; use own experience to expand and explain

Slide 19



Slide 20



SAY: An effective trainer will want to know how much knowledge the trainees have retained. To accomplish this, the trainer will question the trainee to assess understanding of the process as a whole or a particular step. The following video will take us through some of these types: including open and closed-ended questions and the funneling technique.

DO: Play video

DO: Direct TMs to training guide to fill in notes for this section.

SAY AND WRITE: **Open-ended questions** generally begin with **adverbs** (**who, what, where, when, how, and why** – SAY EXAMPLES) while **closed ended questions** typically begin with **verbs** (**can, will, do, should, are** – SAY EXAMPLES) Trainers should take the time to plan their questioning so that they are able to assess need to know information. Their will be those unplanned moments where a question will be the best way to measure understanding. Asking an effective question at the moment takes **effort, concentration, and practice.**

Slide 21



DO: Open and Closed Questions Exercise

You need two cards for each TM. You must prepare the cards before the course. On each card write a word for an object such as “glass”, “car”, “phone”, “stylus” and “wheel”.

Divide the delegates to pairs. If you have an odd number of TM use a group of 3. Ask each group to nominate who would start asking questions and who would answer them. Give one card at random to the person in each group who will be answering. Explain that each card is unique. Make sure they don’t show their cards to anyone else.

In each pair, ask the other person in the group to ask “closed questions” to guess the word written on the card. The person who is answering should reply accordingly and make sure the right type of question has been asked. Allow 10 minutes for this part or when all groups have finished.

Collect the cards and put them in a different pile.

Swap roles and give a new card to the person who was previously asking questions. Get TMs to go over a similar exercise while asking closed questions in order to guess the word. After 10 minutes collect the cards.

Swap roles again and give a new card to each group. This time the person who is asking questions should only ask open questions. The only rule is that they cannot ask a direct question about the word written on the card such as, “What is the object?” They can ask questions such as, “What is it made of?”, “What colour is it?”, “What is the use?” and so on.

The person who is answering should not answer any accidental closed questions and should highlight this to the questioner to ask a new question.

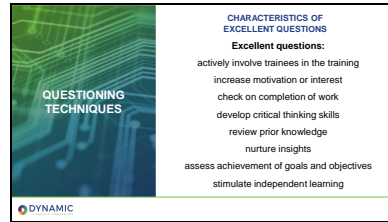
Allocate 5 minutes. Expect that this time the questioners find the answers much more quickly, which is the main point of the exercise.

Collect cards, swap roles, give a new card and repeat the exercise one more time.

Discussion

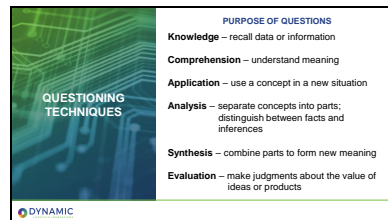
Which type of questioning was faster? Did you ever ask the wrong type of question? Even when you were told to ask open questions, did you tend to ask closed questions automatically? What do you think of open and closed question? When would you consider using each type?

Slide 22



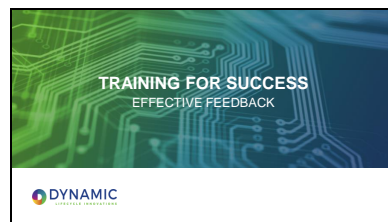
DO: Direct TMs to training guide to fill in notes for this section. Expand on each, defining and applying to training, while TMs fill in notes.

Slide 23



DO: Direct TMs to training guide to fill in notes for this section. Expand on each, defining and applying to training, while TMs fill in notes.

Slide 24



DO: Open and Closed Questions Exercise

You need two cards for each TM. You must prepare the cards before the course. On each card write a word for an object such as “glass”, “car”, “phone”, “stylus” and “wheel”.

answering. Explain that each card is unique. Make sure they don’t show their cards to anyone else.

Divide the delegates to pairs. If you have an odd number of TM use a group of 3. Ask each group to nominate who would start asking questions and who would answer them. Give one card at random to the person in each group who will be

In each pair, ask the other person in the group to ask “closed questions” to guess the word written on the card. The person who is answering should reply accordingly and make sure the right type of question has been asked. Allow 10 minutes for this part or when all groups have finished.

Collect the cards and put them in a different pile.

Swap roles and give a new card to the person who was previously asking questions. Get TMs to go over a similar exercise while asking closed questions in order to guess the word. After 10 minutes collect the cards.

Swap roles again and give a new card to each group. This time the person who is asking questions should only ask open questions. The only rule is that they cannot ask a direct question

about the word written on the card such as, “What is the object?” They can ask questions such as, “What is it made of?”, “What colour is it?”, “What is the use?” and so on.

The person who is answering should not answer any accidental closed questions and should highlight this to the questioner to ask a new question.

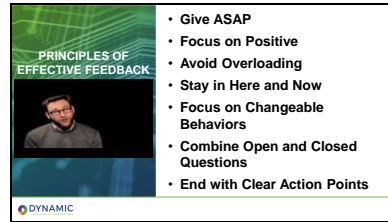
Allocate 5 minutes. Expect that this time the questioners find the answers much more quickly, which is the main point of the exercise.

Collect cards, swap roles, give a new card and repeat the exercise one more time.

Discussion

Which type of questioning was faster? Did you ever ask the wrong type of question? Even when you were told to ask open questions, did you tend to ask closed questions automatically? What do you think of open and closed question? When would you consider using each type?

Slide 25



SAY: Let's watch another clip from Simon Sinek on the importance of feedback.

DO: [Play video](#)

SAY: Give ASAP – Not telling the trainee immediately that they are doing something incorrectly may lead to the action becoming habitual. You also risk losing their trust. Keeping the feedback “in the moment” helps to make that positive action habitual as well.

Focus on Positive - Positive feedback provides fuel for internal motivation. Negative feedback tends to put the trainee on the defensive or lower motivation. This is not to say that negative feedback should be avoided, but if it is necessary, try to point towards the positive in the training session.

Avoid Overloading – As we are training in the moment, we want to be specific with our feedback. Focus on a specific action that can be addressed and do so one at a time. Specific feedback will also remove ambiguity and reinforces what you want the participant to do more of. Overloading the trainee with too much feedback may cause these specific points to be lost in the crowd.

Focus on Changeable Behavior – We cannot expect trainees to change something fundamental about themselves (intelligence, personality traits) within a training setting. Praising effort instead of intelligence increases intrinsic motivation and provides a template for the trainee to follow the next time.

Combine Open and Closed Questions – As we discussed earlier, closed questions only allow for a yes or no answer while open ended questions allow for a greater variety of answers. Knowing when to use each (closed for conveying key information and focusing the conversations and open to get a better understanding of the situation) is essential to create a broader understanding for the trainee.

End with Clear Action Points – Effective feedback leads to a change in behavior. Your role as a trainer is to facilitate this change. Give clear action points allows for the trainee to understand how to apply their new skills and knowledge.

Slide 26



SAY: How we give feedback varies from person to person. There is no one way to give effective feedback. There are many variables to take into account including the skills of the trainer, the skills of the trainee, the environment, and so on. We will put this skill of giving feedback into practice through a drawing activity.

You will form groups of 3 for this activity. One person will serve as the trainer. They will be given a picture of an object. The other two people are

the trainees. They will each be given a piece of paper and a pencil. The trainers job over the next 5 minutes will be to instruct their team members to draw their object. The catch is – you can only use your voice and you will all be back to back. Secondly, the trainees are only allowed to ask you to repeat yourself if necessary. After 5 minutes have gone by, your team can share your work with each other. You will then be asked to give feedback (OREO) to your trainer based on some of the questions that are displayed on the board. We will then regroup, assign a new trainer with a new picture, and repeat two more times

DO: DRAW THE OBJECT ACTIVITY

Slide 27



Slide 28

TRAINING CHECKLIST

Hyperlinks to
Trainer
Manual

Hyperlinks to
Process and
procedure

Hyperlinks to
SkillsFlex

DYNAMIC <small>LIFECYCLE INNOVATIONS</small>		Training Checklist		Trainee/Job Title:	
Document Control - #	8010-004		Trainer:		
Process :	Loading Line 1 on Presort	B	Supervisor:		
STATUS	SECTION NUMBER	TM's Are Trained when they can...	START DATE	COMPLETE DATE	TRAINEE INITIALS
					TRAINER INITIALS
					SUPER. INITIALS

Color of Flex Matrix

Relates to section on Trainer Manual

Direction

Training Start Date

Date that team member is considered "Fully Trained"

28

Slide 29

TRAINING CHECKLIST SECTIONS

DYNAMIC <small>LIFECYCLE INNOVATIONS</small>		Trainee Checklist - New Team Member			
Start Date:		End Date:		Trainee:	
Division:		ITAD		Trainer:	
Department:		INBOUND SORT		Supervisor Signoff - Team Member trained	
Process #s:		7010-003		X:	
SECTION NUMBER	Given required tools and workspace, the TM is able to...	START DATE	COMPLETE DATE	TRAINEE INITIALS	TRAINER INITIALS
1-5	Introductory Items				
	Define purpose and scope of process				
	Summarize Reference docs and locate references within process				
	Demonstrate proper use of PPE (New Hire - NH)				
	Demonstrate knowledge of safety risks and able to identify precautions put in place according to				
	Complete EOD Cleaning Checklist				
6	Work Instructions				

29

Slide 30

TRAINING MANUAL

PRE-SORT LOADER
TRAINING MANUAL

OJT TRAINER MANUAL
Recovery- Pre-sort Loader

INTRODUCTORY ITEMS
Define purpose and scope of process

- Safety, Instruction, process guidelines for loading line one presort.
- NOTE: Stress the importance of quality and compliance when working on the process in respect to our certifications.
- Loading the Pre-sort line takes commodity identification, a strong sense of forklift safety and the ability to work at a fast pace
- ✓ TM is able to define the process using basic terminology, demonstrating an understanding of the purpose and scope.

Header/Step aligns with trainee checklist

BULLET POINTS:
Instructions for trainers on what needs to be done to meet checklist item

CHECKMARKS: KSA needed to be fulfilled for checklist item

30

Slide 31

OJT LAB

3. ASSESSMENTS

Completed OJT Lab Training - This can also be done on the floor with new team members until the OJT Lab is created

- ✓ TM has successfully completed process using all commodities on testing shelf

4. PROCESS AUDITS

- ✓ TM has complete process four times successfully (observed by trainer and/or supervisor)

Prior training steps and assessments to be completed in OJT Lab setting

Audits to be completed by trainer/supervisor while TM is working in area

31

Slide 32

TALENT LMS WALKTHROUGH

LMS website: <https://dynamiclifecycleinnovations.talentlms.com/>

User Name:

First letter of first name & last name (unless you've changed it)

Example: Jane Doe = Jdoe

Password: Same as user name

32

Slide 33

INSTRUCTOR VIEW

33

Slide 34

THE COURSE IS THE PROCESS

34

Slide 35

UPLOADING FILES

35

Slide 36

ADDING FILES TO COURSE CONTENT

36

Slide 37

UPLOADING FILES TO COURSE

37

Slide 38

ORGANIZING FILES

38

Slide 39

ENROLL/REMOVE USERS

39

Slide 40



Appendix B: Train the Trainer Workbook/Presurvey

TRAIN THE TRAINER

9.28.2020

COURSE OBJECTIVES

SUMMARIZE THE ROLE OF A TRAINER

DEMONSTRATE THE QUALITIES OF A TRAINER

EXPLAIN THE IDEAL SAFE TRAINING ENVIRONMENT

EXAMINE THE WAYS OF WORKING WITH ADULT LEARNERS

DEMONSTRATE PROPER QUESTIONING AND FEEDBACK

SUMMARIZE THE USE OF THE TRAINING DOCUMENTATION

ROLE OF A TRAINER

The role of a trainer is to build a **CONFIDENTLY COMPETENT** team member. The trainer will identify the KSAs needed to achieve this competence.



KNOWLEDGE – subjects, topics and items a trainee should know that are applied directly to performance of work functions

CURRENT ROLE EXAMPLES –

SKILLS – measurable and objective technical/manual proficiencies that are usually learned during training

CURRENT ROLE EXAMPLES –

ABILITIES – applying several knowledge and skills simultaneously creating enduring talents that can help a person do a job

CURRENT ROLE EXAMPLES –

ROLE OF A TRAINER cont.

The role of a trainer is to teach both **hard** and **soft** skill sets.

HARD SKILLS: teachable abilities or skills that are easy to quantify – direct

SOFT SKILLS: people/interpersonal skills – indirect

The role of a trainer is to **access competence**.

QUALITIES OF A TRAINER

PROCESS “EXPERT” – knowledgeable in the process/always learning

PATIENT – a patient listener ready to meet the trainee’s needs

COMMUNICATOR – open and honest; speak clearly and listen actively

ORGANIZED – keeps training focused and help to maintain attention

INNOVATIVE – ready to adapt at a moment’s notice to meet needs

LIST AN EXAMPLE OF A TRAINER IN YOUR LIFE THAT HAS DEMONSTRATED (OR NOT DEMONSTRATED) ONE OF THESE QUALITIES AND HOW IT AFFECTED YOUR TRAINING POSTIVELY OR NEGATIVELY. **(NOTE – ROSS AND RACHEL RULE)**

SAFE LEARNING ENVIROMENT

Trainers provide a safe learning environment which is essential to establishing an **ATMOSPHERE OF TRUST**.

ENCOURAGE PARTICIPATION

MORE GUIDE ON THE SIDE, LESS SAGE ON THE STAGE

ENCOURAGE PARTICIPANTS TO TRACK THEIR PROGRESS

WORKING WITH ADULT LEARNERS

A trainer is working with adults. Teaching adults has similarities to working with children in some respects. All learners are different though. Take into account the following with working with adults:

RELEVANT/TIMELY

LEARNER CONTROLLED/DIRECTED

LEARNING STYLES: VISUAL, AUDIOTORY, KINESTETIC

BASED ON PRIOR EXPERIENCE

SCENARIO- OR CASE-BASED

QUESTIONING TECHNIQUES

*** FOLLOW ALONG WITH THE PRESENTATION TO FILL IN NOTES**

_____ - ended questions generally begin with _____
(who, _____, _____, _____, _____, and _____)

_____ - ended questions typically begin with _____
(can, _____, _____, _____, _____)

Asking an effective question at the moment takes _____, _____, and _____.

CHOOSE YOUR TOP FIVE KEY QUESTIONING CHARACTERSTICS

1. _____
2. _____
3. _____
4. _____
5. _____

PURPOSE OF QUESTIONS

- _____ – recall data or information
- _____ – understand meaning
- _____ – use a concept in a new situation
- _____ – separate concepts; facts v. inferences
- _____ – combine parts to form new meaning
- _____ – judgments on the value of ideas/products

EFFECTIVE FEEDBACK

*** TAKE A MOMENT TO WRITE/SHARE YOUR DEFINITION TO THREE PRINCIPLES OF EFFECTIVE FEEDBACK AND BE READY TO SHARE**

GIVE ASAP

FOCUS ON POSITIVE

AVOID OVERLOADING

STAY IN HERE AND NOW

FOCUS ON CHANGEABLE BEHAVIORS

COMBINE OPEN AND CLOSED QUESTIONS

END WITH CLEAR ACTION POINTS

[ACTIVITY NOTES: Delivering Instructions](#)

[ACTIVITY NOTES: Approach Matters](#)

[ACTIVITY NOTES: Training Documentation](#)

[ACTIVITY NOTES: Process Training](#)

OJT Trainer Getting Started Worksheet

1) My definition of success is:

2) Three things I remember feeling my first couple days at Dynamic:

3) I am still working at Dynamic because:



ROLE OF A TRAINER

Score: _____

1. KSA = Which of these is an observable act that is required to perform a job operation with precision?

- ☐ A Knowledge
- ☐ B Skills
- ☐ C Abilities



2. KSA = Which of these describes a more general capability to perform an observable behavior?

- ☐ A Knowledge
- ☐ B Skills
- ☐ C Abilities



3. KSA = Which of these is the body of factual and procedural information applied to a task?

- ☐ A Knowledge
- ☐ B Skills
- ☐ C Abilities



4. Hard skills are also known as "people skills" or "interpersonal skills".

- ☐ A True
- ☐ B False

5. Which of these best describes ideal communication between trainee and trainers?

- ☐ A Open and honest
- ☐ B Straightforward and accurate
- ☐ C Free-flowing and adaptable

6. List for me the top three qualities you feel make an excellent trainer. Use the list below or identify a quality that is not shown here.
(PROCESS "EXPERT", PATIENT, COMMUNICATOR, ORGANIZED, INNOVATIVE, EFFICIENT)



7. A trainer will serve as a _____ on the _____.

- ☐ A guide/side
- ☐ B sage/stage

8. A trainee should be given their checklist to help them better understand their path to competency.

- ☐ A True
- ☐ B False



Learning Style Inventory

To better understand how you prefer to learn and process information, place a check in the appropriate space after each statement below, then use the scoring directions at the bottom of the page to evaluate your responses. Use what you learn from your scores to better develop learning strategies that are best suited to your particular learning style. This 24-item survey is not timed. Respond to each statement as honestly as you can.

	Often	Sometimes	Seldom
1. I can remember best about a subject by listening to a lecture that includes information, explanations and discussions.			
2. I prefer to see information written on a chalkboard and supplemented by visual aids and assigned readings.			
3. I like to write things down or to take notes for visual review.			
4. I prefer to use posters, models, or actual practice and other activities in class.			
5. I require explanations of diagrams, graphs, or visual directions.			
6. I enjoy working with my hands or making things.			
7. I am skillful with and enjoy developing and making graphs and charts.			
8. I can tell if sounds match when presented with pairs of sounds.			
9. I can remember best by writing things down.			
10. I can easily understand and follow directions on a map.			
11. I do best in academic subjects by listening to lectures and tapes.			
12. I play with coins or keys in my pocket.			
13. I learn to spell better by repeating words out loud than by writing the words on paper.			
14. I can understand a news article better by reading about it in a newspaper than by listening to a report about it on the radio.			
15. I chew gum, smoke or snack while studying.			
16. I think the best way to remember something is to picture it in your head.			

17. I learn the spelling of words by “finger spelling” them.			
18. I would rather listen to a good lecture or speech than read about the same material in a textbook.			
19. I am good at working and solving jigsaw puzzles and mazes.			
20. I grip objects in my hands during learning periods.			
21. I prefer listening to the news on the radio rather than reading the paper.			
22. I prefer obtaining information about an interesting subject by reading about it.			
23. I feel very comfortable touching others, hugging, handshaking, etc.			
24. I follow oral directions better than written ones.			

Scoring Procedures

Directions: Place the point value on the line next to the corresponding item below. Add the points in each column to obtain the preference score under each heading.

OFTEN = 5 points SOMETIMES = 3 points SELDOM = 1 points

VISUAL		AUDITORY		TACTILE	
NO.	PTS.	NO.	PTS.	NO.	PTS.
2		1		4	
3		5		6	
7		8		9	
10		11		12	
14		13		15	
16		18		17	
19		21		20	
22		24		23	
VPS =		APS =		TPS =	
VPS = Visual Preference		APS = Audio Preference		TPS = Tactile Preference	

Characteristics of Learning Styles

Three of your senses are primarily used in learning, storing, remembering and recalling information. Your eyes, ears, and sense of touch play essential roles in the way you communicate, perceive reality and relate to others. Because you learn from and communicate best with someone who shares your dominant modality, it is a great advantage for you to know the characteristics of visual, auditory and kinesthetic styles and to be able to identify them in others.

Visual

- Mind sometimes strays during verbal activities
- Observe rather than acts or talks
- Likes to read
- Usually a good speller
- Memorizes by seeing graphics or pictures
- Not too distractible
- Finds verbal instruction difficult
- Has good handwriting
- Remembers faces
- Uses advanced planning
- Doodles
- Quiet by nature
- Meticulous, neat in appearance
- Notices details

Auditory

- Talks to self aloud
- Enjoys talking
- Easily distracted
- Has difficulty with written directions
- Likes to be read to
- Memorizes sequentially
- Enjoys music
- Whispers to self while reading
- Distracted by noise
- Hums or sings
- Outgoing by nature
- Enjoys listening activities

Kinesthetic

- Likes physical rewards
- In motion most of the time
- Likes to touch people when talking
- Taps pencil or foot when studying
- Enjoys doing activities
- Reading not a priority
- Poor speller
- Likes to solve problems by physically working through them
- Will try new things
- Outgoing by nature; expresses emotions by physical means
- Uses hands while talking
- Dresses for comfort

SOUND: Hints for the Auditory Learner

General

1. Say aloud the information to be learned/have someone read the information to you/read it into a tape recorder and replay it.
2. Read your work out loud. Summarize what you have read on tape.
3. Say words inside your head silently.
4. Brainstorm ideas with others. Form study groups.
5. When possible, learn information through tapes, television, oral reports, rhymes and songs, radio, lectures, book reviews, panel and group discussions, guest lectures, and oral questions and answers.
6. Use a straight-edge marker or guide to assist you in keeping your place while you are reading or working with printed materials.
7. Tape class lectures (Ask instructor for permission).
8. Meet with classmates before and/or after class to discuss material.

Writing

1. Plan each sentence you want to write by saying it out loud or silently in your head.
2. Say each sentence several times.
3. Write each sentence as you say it, or talk into a tape recorder, dictating each sentence of your paragraph; then play the tape back – one sentence at a time – and record your paragraph in writing.

Spelling

1. Listen to the spelling of the word.
2. Say the word – then say each letter out loud
3. Close your eyes and spell the word out loud; check your spelling.
4. Close your eyes and spell the word out loud again; check your spelling.
5. Now write the word, trying to hear it in your mind.
6. Verbally review spelling words and lectures with a friend.

Mathematics

1. Learn math while saying the concept, fact, theorem, etc., aloud.
2. Explain math problems, concepts, facts, etc., to yourself, relating the information out loud.
3. Use a tape recorder and replay the information.

SIGHT: Hints for the Visual Learner

General

1. Take notes, make pictures, graphs, and charts. Use flashcards and highlight key details
2. Sit close to the teacher so that you can watch his/her face and gestures.
3. Take notes or make lists as you listen to directions.
4. Carefully check instructions written on the chalkboard and on handouts.
5. as the teacher lectures, pay attention to visual aids such as the following:
 - Drawing, maps, graphs, charts
 - Transparencies, posters, films, books
6. Imagine pictures of the information you are suppose to remember.
7. Use color coding as cues to important information.
8. When possible, read assignments silently.
9. Maintain class notes and outlines of important information to study.
10. Try to read and study in well lit, quiet place.
11. Record homework assignments in a date book, on a note pad, or a specially designed assignment sheet.
12. Keep a note pad with you at all times. Write out everything for frequent and quick visual review.

Reading

1. Use sight words, flashcards, note cards and experience stories; don't try to sound words out, but try to determine if the new word or words has words you already know. For example, the "systematic" has the word "system", "stem" and "mat" within it.
2. You are a "look-and-say" learner. Look at a word carefully; then say it.

Writing

1. Jot down ideas as they form in your mind.
2. Outline your ideas.
3. Make a rough draft, skipping lines. Correct/revise your work.
4. Re-coy your paper.
5. ESSAY TEST: Make quick outlines on scratch paper or in the margin of the test before writing your answer.

Spelling

1. See the word – close your eyes.
2. Make a picture – then read from your picture.
3. Write the word – match the picture.
4. Check your work immediately.

Mathematics

1. Visualize the problem.
2. Make pictures or tallies of the problem on scratch paper.
3. Write the problem.

TOUCH: Hints for the Tactile/Kinesthetic Learner

1. Keep your desk clear of distracting objects.
2. Cover the page you're not reading
3. If you are distracted by noise, turn off the radio; wear earplugs or wear an earphone in the learning center to block out the noise. If you want sound, listen to soft music.
4. Divide your work into short study sessions. Get a timer. After 20 minutes or when a task is completed, give yourself a reward, a cookie, a walk around the block, listen to one song, etc.
5. Sit as close to the teacher as possible, or sit in the center of the room by quiet students.
6. When studying, use a multi-sensory approach (hearing, seeing, touching and doing) as much as possible.
7. Get plenty of sleep.
8. Eat a nutritious breakfast and lunch. Snack on fruit or nutritional food if you need extra energy.
9. Study in a carrel or in an office where there is a desk for your text books and notebook.
10. Use models, real objects, and materials that can be touched and moved. For example, learn geography through handling and studying a globe.
11. When possible draw what you are learning.
12. Trace spelling words as you practice them.
13. Record in writing information learned. Keep a supply of paper on hand.
14. When possible, role play, type, take notes, or construct models to learn the information.

TRAIN THE TRAINER SESSION

DATE

PRE-SURVEY

Please complete the following survey and return to Justin Groth by **DATE**

NAME: _____

DIVISION (ITAD/DUO) _____ **DEPT:** _____

ICEBREAKER ACTIVITY QUESTIONS – Complete as many as you like

HOMETOWN:

TELL US ONE FACT ABOUT YOURSELF FROM YOUR HIGH SCHOOL YEARS:

COLLEGE (Y/N) IF YES, WHERE DID YOU ATTEND?

DESERT ISLAND QUESTIONS:

Name the one item for each category you would wish to have if trapped on a desert island.

BOOK: _____

DESSERT: _____

SURVIVAL ITEM: _____

ANIMAL COMPANION (not for eating!): _____

DO YOU HAVE PRIOR TRAINING EXPERIENCE? (Y/N)
IF YES, DESCRIBE YOUR ROLE AS A TRAINER.

KWL (KNOW, WANT TO KNOW, LEARNED)

Please complete the first two sections of the KWL for training. You will complete the third sections during the training.

WHAT I KNOW ABOUT TRAINING	WHAT I WANT TO KNOW ABOUT TRAINING	WHAT I HAVE LEARNED ABOUT TRAINING

Appendix C: Train the Trainer Assessment Form

NAME _____

DIVISION/DEPARTMENT _____/_____

**Please rate the following information on a scale of 1 to 5
(5 - Excellent, 4 - Very Good, 3 - Good, 2 - Fair, 1 - Poor)**

This training was relevant to the work I perform on a daily basis.

5	4	3	2	1
---	---	---	---	---

The instructors showed enthusiasm for the subject matter.

5	4	3	2	1
---	---	---	---	---

Information was relayed effectively, and the instructors were able to keep my attention.

5	4	3	2	1
---	---	---	---	---

A variety of different materials were used to present the topics.

5	4	3	2	1
---	---	---	---	---

The importance of each topic was stressed before instruction began.

5	4	3	2	1
---	---	---	---	---

The length of the training was neither too long nor too short.

5	4	3	2	1
---	---	---	---	---

The instructors provided adequate resources for training.

5	4	3	2	1
---	---	---	---	---

The class had plenty of opportunities to ask questions.

5	4	3	2	1
---	---	---	---	---

The instructors were knowledgeable of the subject matter.

5	4	3	2	1
---	---	---	---	---

Topics flowed seamlessly from one subject to the next, and seemed to be presented in proper order.

5	4	3	2	1
---	---	---	---	---

Overall, how would you rate the training?

5	4	3	2	1
---	---	---	---	---

What part of this training will benefit you most in the future?

What part of this training will be least useful?

Were there any topics that should have been included but were not?

What changes would you recommend for future training sessions?

Appendix D: Train the Trainer Assessment Results

	SESSION #1	SESSION #2	SESSION #3	SESSION #4	SESSION #5
This training was relevant to the work I perform on a daily basis.	4.36	4.44	4.7	4.2	4.00
The instructors showed enthusiasm for the subject matter	4.63	4.94	4.8	4.8	4.83
Information was relayed effectively, and the instructors were able to keep my attention.	4.72	4.69	4.6	4.6	4.83
A variety of different materials were used to present the topics.	4.54	4.78	4.6	4.8	4.50
The importance of each topic was stressed before instruction began.	4.36	4.50	4.9	4.6	4.67
The length of the training was neither too long nor too short.	4.00	4.19	4.6	4.4	3.83
The instructors provided adequate resources for training.	4.54	4.56	4.6	5	4.17
The class had plenty of opportunities to ask questions.	4.36	4.94	5	5	4.67
The instructors were knowledgeable of the subject matter.	4.63	4.88	4.8	4.8	5.00
Topics flowed seamlessly from one subject to the next, and seemed to be presented in proper order.	4.45	4.56	4.8	4.6	4.50
Overall, how would you rate the training?	4.63	4.81	4.6	4.6	4.33

RECOMMENDATIONS FOR FUTURE TRAIN THE TRAINER COURSES:

What part of the training will benefit you most in the future?

- **Being able to know how different people learn in different ways**
- **Qualities of trainers, meeting trainers from other departments, and the importance of open & closed ended questioning**
- **Characteristics of Learning Styles**
- **Working together with new people will benefit most**
- **I will benefit from all of it; how to create connections when training**
- **Tips in communication and the resources available**
- **exercises and explanations of different learning styles and how to properly teach people depending on their learning style**
- **Asking more questions to see what info is being comprehended to know what more focus should go toward I hope that I can take this training and make my training more effective in the future**
- **Having everyone be on the same page will make training easier as a whole**
- **Open ended questions vs. closed ended questions**
- **Info on feedback**
- **Train the trainer guidebook, the trainer checklist, and trainer guide**
- **The time we spent practicing training**
- **I think the exercise where they hid the golf ball really shows how your attitude can affect feedback**
- **Learning about the learning styles will help with future trainings**
- **Knowing all the other trainers**
- **Being able to uniformly train people and being able to track their progress**
- **Training incoming TMs**

What part of the training will be the least useful?

- **I think the positive/negative/direct instructions activity did not help more than simply explain it would**
- **Knowing the codes in the future**
- **The complexity of the jewelry code bargaining exercise**
- **The activities that did not relate to work done at Dynamic**
- **Identifying KSAs will this be provided to our trainers**
- **The worksheets**
- **The Simon Sinek Videos**
- **The icebreaker**
- **In class group activities**

Were there any topics that should have been included but were not?

- **I know it isn't in a written form all the way yet, but the learning management system has been spoken about would/will be nice too.**
- **Question and answer time took care of that**
- **More instruction on the training checklist**

- I think talking about importance of positivity as a trainers opening impressions of a trainee is important, negativity is cancerous. Trainer is always on stage while training.
- An activity on learning types. Train someone on the same thing 3 different ways. Audio-visual-tactile
- Roll-out timeline and what happens next. The LMS component of the training/development management
- Hospitality - being warm and welcoming to new employees can make a big difference in their attitude and willingness to learn
- More in depth examples about training techniques
- How to deal with people who are hard to train/don't care
- Having better communication with new TMs. Personally, I'm not big into small talk with people. When I first meet them so some better communication techniques would be nice.
- More detail on how to handle people that are unapproachable - How to get someone engaged.
- If the trainee will not listen to you
- How to word things to trainers without being rude or overbearing
- How to access the trainer material and were to find it
- Maybe more instruction on what to do if conflict starts to rise or team member feel that their training is no going well. When do we try a different role
- No actual examples of good training were presented. Video of actual training video that utilizes principle discussed
- I think the class covered everything that needed to be covered
- How to effectively use the training doc with the lessons in class

What changes would you recommend for future training sessions?

- I think we could make this a longer training session - eventually maybe more in-depth with the checklists and trainer manuals
- Don't talk when people are writing
- Remove the positive/negative/direct instructions activity and focus on our training checklist more
- Maybe break it up into multiple, more focused sessions - not having it after a very dry leadership meeting
- I would have liked it to be a little longer so that we would not be pushed for time
- Talk about the departments the trainers are in, not just general
- More time for Q&A
- I think if some things could have been shorter. The class was very long.
- Simplifying the code exercise so the "trainers" are focusing on the training process and not distracted by new subject matter.
- More emphasis on hard to train people
- Not doing the jewelry store bargaining exercise. It was so confusing.

- Maybe more breaks to get the blood flowing but there were enough
- Do not hold during first and last week of month for brokering.
- If possible, use material from facility and more tools as time goes by
- More hands on practice, maybe some situations to practice with
- More controlled spaces maybe
- More time on the floor for the trainers to give a more detailed walkthrough and allow more questions. 15 minutes only really allows high level conversations
- More time for on floor training (process training activity) if needed
- I would like to see more time given for the classes. It seemed like we rushing though too fast just so we can fit everything in
- More time on the floor to go through the training process