



# How to Improve Your Effectiveness as a Workplace Trainer: A Basic Six-Step Model



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## How to Improve Your Effectiveness as a Workplace Trainer: A Basic Six-Step Model

*Have you ever been asked to train a new employee or coworker on a new task or procedure?*

*Did you feel uncomfortable in accepting because you had no prior experience as a workplace trainer? If so, this article can help you with this task by offering a concise, practical model for you to follow when creating workplace training experiences for your coworkers.*


Experienced workers and first-line supervisors are frequently called upon to provide new hires or less experienced personnel with the needed skills and knowledge to perform new job tasks via training given at the workplace (to be called “*workplace training*” in this article).

Some organizations have formal pre-employment training programs for newly assigned workers (to be called the *Trainee* in this

article), but many utilize an *informal* approach that leaves the responsibility for developing and delivering the training to an experienced

employee or supervisor (to be called the *Workplace Trainer* in this article). In such cases, the employer frequently views the workplace training process as a “black box”, unsure of what transpires, hoping for a good result, and unsure of the cause of poor results.

This article discusses a *basic* method that can help Workplace Trainers improve their training efforts. It is focused on the preparation and delivery of workplace training in situations where: (a) there is no formal pre-employment training program, (b) where an employee is assigned new, unfamiliar tasks or procedures, (c) where there is no formal process for training employees at the workplace and, (d) where



*“We have inadvertently trained people to believe that the answer to a development need is to find a suitable course. The latter have their uses, but I always urge people to think of work-based actions first” – Benjamin Disraeli*

the training responsibility is delegated to a selected employee or supervisor who has no prior instructional training.

The article will begin by discussing two of the most important characteristics of an effective *Workplace Trainer* - Job Knowledge/Skill and Professional Work Attitude. It will then look at the three primary learning styles of Trainees, followed by a description of a Basic Six-Step Workplace Training Model.

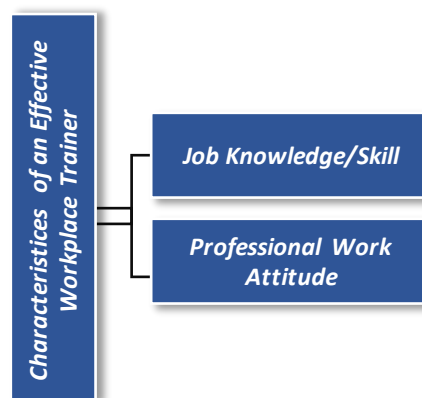
## Two Important Characteristics of an Effective Workplace Trainer

Before getting to the Basic Six-Step Workplace Training Model, let's begin by discussing two key characteristics found in effective Workplace Trainers: Job Knowledge/Skill and Professional Work Attitude.

**1. Job Knowledge/Skill:** To be an effective Workplace Trainer you should have the appropriate knowledge, skills, and experience for the tasks being taught to the Trainee. This may seem obvious, but, in many workplaces, the workplace training duties are haphazardly assigned (with little regard in the selection of the Trainer nor effectiveness of the training delivered).

As a Workplace Trainer, you should also be thoroughly familiar with your organization's policies and procedures, especially regarding, equal employment, non-discrimination and sexual harassment, and should ensure these policies are followed in all interactions with your Trainees.

### Characteristics of an Effective Workplace Trainer



**2. Professional Work Attitude:** As a Workplace Trainer you should also demonstrate a professional attitude toward your work. A professional work attitude goes “hand in hand” with the needed

knowledge and skill competencies necessary to be an effective Workplace Trainer. Many training experts believe it is one of the most important factors in helping Trainees learn new tasks. Now, let's examine some components of a professional work attitude:

a. Ideally, it would include a strong *desire* to serve as a Workplace Trainer for new employees. In most cases, a qualified, volunteer trainer should be more effective than someone coerced to provide the required training.

b. The ability to establish rapport with Trainees, and to treat them fairly and with respect - regardless of their gender, race, heritage, religion, sexual preference, marital status, religion, economic status or educational background.

c. It would include the avoidance of profanity, offensive humor, ridicule and sarcasm with new Trainees, as this could negatively impact their learning.

d. It would include setting a good example by performing your assigned duties at work, in an ethical and honest



*"There are two kinds of people, those who do the work and those who take the credit. Try to be in the first group; there is less competition there" – Indira Gandhi.*

manner, following the established workplace policies and procedures, and presenting a positive attitude regarding the organization and job (in the presence of a new trainee). As a Workplace Trainer you should model the performance you expect from your Trainee. (Note: Nothing can have a more disheartening and negative impact on a new employee's workplace learning than a Workplace Trainer who has a negative attitude toward their organization, their job responsibilities, fellow co-workers and life in general). Just ask yourself, how you would respond to a Workplace Trainer who displayed such a persona?

e. It would include being patient and even-tempered with new Trainees and encouraging them to ask questions when they are unsure of something being taught.

### Three Adult Learning Styles

Another important component in a workplace training effort is an understanding of the different learning styles used by learners. Incorporating training methods that address these learning styles

should help you develop a better workplace training session. Training and development experts frequently divide adult learning styles into three broad categories:

1. Visual Learners. According to adult training experts the sense of vision accounts for approximately 75 percent of an adult's learning. As such, it is important to address the need for visual aids in developing your workplace teaching materials. Visual learners generally learn more effectively with the liberal use of diagrams, graphics, written materials, flowcharts, and drawings, etc.

### Adult Learning Styles



2. Auditory Learners. The hearing sense is the second to vision in learning but still makes up a significant portion of our sensory learning. Utilizing both visual and auditory aids in your workplace training demonstrations and presentations should increase their effectiveness. Auditory learners generally learn more effectively via briefings, lectures, verbal presentations, small-group discussions. Verbal cues (statements to the Trainee such as, "This is important" would also be helpful. Remember, deliver your demonstration energetically and vary your voice patterns, inflection and volume.

3. Kinesthetic Learners. Trainees with a kinesthetic learning preference will generally absorb new workplace knowledge and skills with methods that involve practice and hands-on action. Practical exercises, role-plays (if appropriate for the task being taught) are useful for incorporating in your training activities.

### A Basic Six-Step Workplace Training Model

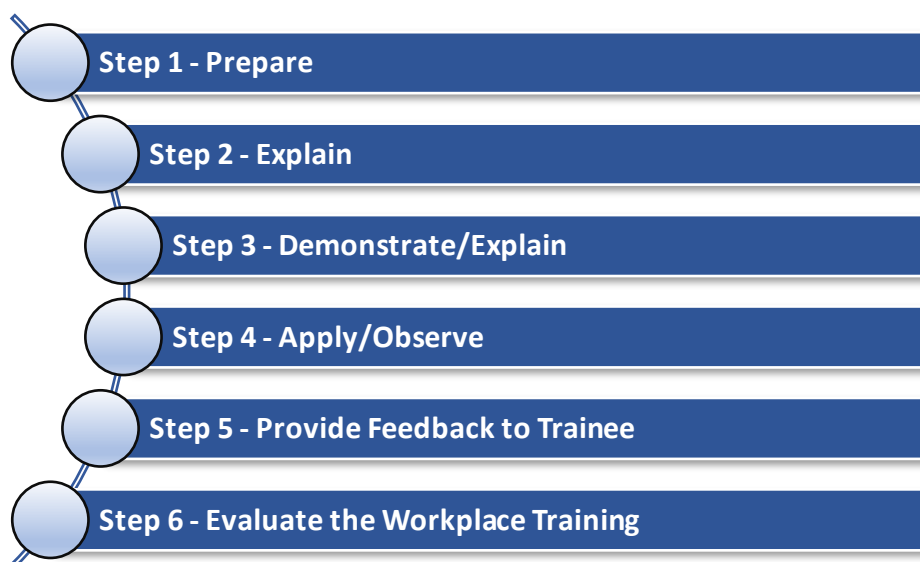
Now that we have discussed the two key characteristics of an effective workplace trainer, and the importance of the three adult learning styles in your training sessions, let's look at a Basic Six-Step Model for preparing, developing and delivering effective workplace training.

## 1. Step One - Prepare:

In this step you should:

- a. Briefly analyze the workplace training by deciding what task(s) need to be taught and what background knowledge is needed for understanding and context for each task. If you are just presenting and explaining new information (such as a new policy change) obtain the needed materials.
- b. Define the steps needed for each task and collect the associated background knowledge materials (existing written step-by-step procedures, operations manuals, guidance memos, etc.)
- c. Prepare your demonstration of the new skills/tasks to be shown and explained to the Trainee. This step in the preparation process would include step-by-step teaching reminders (a mini-session plan) for yourself (the Trainer). You should also determine what workspace, equipment (e.g., presentation equipment, machines, tools, software, hardware), supplies and other materials you might need for your demonstration. Try and include a broad mixture of job aids, whenever possible, such as flow charts, process diagrams, step-by-step guides, lists, matrices, posters, and frequently asked questions (FAQs). Make sure you stress safety concerns in those cases where the training involves hazardous activities. Make copies of job aids for the trainees also. (**Remember** - to consider the three learning styles, mentioned in the earlier section, when developing your skills demonstration and or knowledge presentation and to include teaching methods to address each of the three styles).

### A Basic Six-Step Workplace Training Model



d. Prepare the workplace training documentation you will need for any record-keeping purposes your organization may require. Such documentation usually includes: (a) a brief description of the training/briefing delivered, (b) duration of the training/briefing, (c) name of Trainee, (d) name of Trainer, (e) date training/briefing delivered, and (f) a certification by the Trainer that Trainee attended the training and/or successfully demonstrated task competence. Retain copies of the training documentation for your records.

## 2. Step Two - Explain:

*In this step you should:*

- a. Establish rapport with the Trainee and as comfortable a learning environment as possible.
- b. Explain to the Trainee what skills and knowledge you are going to cover in your workplace training session. This should include a detailed description of the workplace learning process and task(s) to be demonstrated.
- c. Encourage the Trainee to ask any questions he/she may have during the Demonstration and/or Presentation.

## 3. Step Three - Demonstrate/Present:

*In this step, you should:*

- a. Demonstrate each task slowly for the Trainee, using a step-by-step process, explaining each step, in detail, as you proceed.
- b. Always model the process correctly and periodically question the Trainee during the demonstration to ensure comprehension. Stress *safety concerns* when involved in any hazardous activities.
- c. At the end of the demonstration ask the Trainee if they are ready to demonstrate and explain the process for you. If they have any questions, answer them and repeat the demonstration until they feel confident to do it themselves.





#### **4. Step Four - Apply/Observe:**

*In this step you should:*

- a. Ask the Trainee to perform the required task(s), in order, following the process previously demonstrated by the Trainer. The Trainee should be instructed to describe each task and step taken to the Trainer as he/she performs it. This allows the Trainer to determine if the Trainee truly understands how to perform the task properly.
- b. Allow the Trainee to perform the task as many times as needed to do it satisfactorily. (The Trainer should NOT do the task for Trainee if they are having difficulty but can provide needed guidance and encouragement).
- c. Ask them questions to gauge their understanding while they are performing the task.

#### **5. Step Five - Provide Feedback to Trainee:**

*In this step you should:*

- a. Let the Trainee know how they did and provide corrective and positive feedback.
- b. Make sure the feedback is specific and individualized. Encourage further questions.

#### **6. Step Six - Evaluate Your Workplace Training Effort**

*At the end of each training effort you should:*

- a. Ask the Trainee if they feel competent in performing the new task and/or satisfactorily informed (for oral presentations).
- b. Ask the Trainee what you could change to improve your workplace training effort for future Trainees (e.g., your teaching techniques, quality of handouts, clarity of written procedures, the learning workspace). Write their suggestions down and store them for later reference.
- c. Ask the Trainee if they have any questions about the entire workplace training effort (e.g., the knowledge and/or skills required to perform the task satisfactorily or to comply with a new policy,



etc.). Record their questions and add them to your "Frequently Asked Questions" document that can be used to prepare future training sessions and as a job aid handout for future Trainees.

d. Clarify any doubts and answer any final questions about the training session. Then thank the Trainee for their participation and encourage them to contact you with any comments or suggestions about the effectiveness of your training (once they have utilized their new knowledge/skills in the workplace).

## Conclusion

This article discussed one method to improve informal training efforts of experienced employees and supervisors (who have no prior training as instructors) selected to train fellow employees on new tasks and/or information at the workplace.

It focused on two of the most important characteristics of an effective workplace *Trainer* - Job Knowledge/Skill and Professional Work Attitude. It then discussed three primary learning styles of adults. Finally, it described a Basic Six-Step Model for developing and presenting effective workplace training.

In conclusion, it should be noted that the model was not intended to be an in-depth description of a workplace training process, as this would have required a much more lengthy and detailed article. It was intended to be a basic aid for those tasked with providing workplace training without the benefit of prior formal instructional training or extensive organizational support. Hopefully, you will find it useful in that regard.

