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Training Delivery Problems and Solutions: Identification of Novice Trainer Problems and Expert Trainer Solutions

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The authors surveyed 371 personnel trainers, asking them to recall training delivery problems or difficulties they had experienced as novices. The analysis of their 1,098 responses led us to conclude that novice trainers faced twelve common training delivery problems. Twenty expert trainers were subsequently surveyed and asked to report their successful strategies for dealing with each of the problems. The analysis of their responses concludes with expert advice on how to deal with the twelve common training delivery problems.

The training of employees at all levels has taken on a significant role in industry and business, with rapid technological advances in the workplace and corporate concern for profit in today's marketplace driving the emphasis on training. When properly used, training increases both the effectiveness and efficiency of employees (Swanson, 1992, 1996a). With all the advances in instructional technology, instructor-led training still remains the most popular method of delivering training year after year, according to the annual census of the profession (*Training,* 1996).

Most beginning trainers are not graduates of programs specifically designed to train trainers. Instead, they are generally subject matter experts in their organizations who have good communication skills. Their preparation to deliver training is often by trial and error. The more fortunate ones observe an experienced trainer teach the course while they are preparing to deliver it and then attempt to teach it to other employees in a manner similar to what they observed.

Continuing criticism of the training profession has focused on the lack of research about the processes used to select trainers and on the evaluation methods used to rate the instruction and the trainer (Swanson, 1982; Jacobs,

1995).Even so, few frontline trainers receive more than a single exposure to training delivery techniques (Jacobs, 1995).

New trainers, insecure about their delivery skills and pressured to obtain high satisfaction scores from participants, end up chasing after teaching gimmicks (Holton, 1996; Swanson, 1996b). Popular training books and workshops on classroom games and gimmicks only serve to magnify their insecurity and serve as inappropriate mental models. As the amount of training in industry and business continues to increase, the knowledge possessed by expert professional trainers will need to be captured and shared with new trainers in organizations (Jacobs, 1992, 1995).

Purpose of the Study

Little has been written about the ways in which expert personnel trainers handle the specific training delivery problems that novice trainers experience in the classroom. Yet proven and practical techniques for dealing with these specific training delivery problems would be helpful to beginners.

This research had three purposes: to determine the difficulties novice trainers experience during the delivery of training; to gather reports from experts on how they handle such difficult situations; and to synthesize this information into a useful aid that defines the common training delivery problems and provides specific expert solutions.

Overview of the Literature

Personnel training and development has grown dramatically during the past three decades, becoming a $30 billion industry. Each year, fifteen million employees participate in 17.6 million courses. One out of every eight American workers attends a formal training course each year (Chakiris and Rolander, 1986). At the same time, more employees each year are finding themselves in the role of trainer without first receiving adequate preparation (Jacobs, 1995).

Understanding and mediating the organization's desire for expertise and the learners' needs are ultimately burdens placed on the trainer's shoulders (Yelon, 1992). The research on training adults in the workplace typically focuses on the needs of the organization (Sleezer, 1992) and of the learner (Knowles, 1984). Much less is known or said about the specific problems faced by novice trainers and on their role in delivering instruction. Trainers need instructional delivery skills when they use such structured learning events as group discussions, presentations, role plays, and case studies. Other needed skills include assessing learners' needs, using media and materials, administering exams or instruments, and providing feedback to participants (McLagan, 1989).

General models of training and learning are important to the profession, and the problems that threaten and discourage beginning trainers are also

important. Knowles (1984) suggested that four concepts can be used to think about adult education at the general level: the self-concept of the learner, the learner's experience, the learner's readiness to learn, and the learner's perspective of time. In a more specific review and synthesis of the instruction literature, Smith (1983a, 1983b) identified the variables that affect the design and delivery of training and the variables that the trainer can control. These include objectives, content structure, instructional sequence, rate of delivery, repetition and practice, knowledge of results, reinforcement, and rewards.

In addition, the selection of instructional approaches depends on many criteria, including conditions of learning, content, and characteristics of the students. Gagne (1987) specified nine variables: gain attention, inform the learner of the learning objectives, present the stimulus material, stimulate the recall of prerequisite learning, provide learning guidance, elicit performance, provide feedback about performance correctness, assess performance, and enhance performance and transfer.

Zemke and Zemke (1988) defined the specific needs of adult learners. For example, it is important that the classroom environment be comfortable, both physically and psychologically. In addition, trainers must understand the participants' expectations of the course because their own concepts are involved. By serving as facilitator or orchestrator, the effective instructor can manage the classroom by allowing participants to share their experiences and knowledge, integrate new knowledge, and provide strategies that will allow transfer of learning back to the job.

Clearly, the job of instructor is complex. Yet while general instruction theories abound, the bulk of the training delivery advice in the practitioner literature is not grounded in research on novice problems (see Pike, 1989). It is difficult to cull from the literature the common training delivery problems that novice trainers face or expert solutions to these problems. Rather, the literature focuses on presentation gimmicks and the demand for "fun-filled" training (Swanson, 1996b).

Research Methodology

The general research strategy of this study involved surveying novice trainers, analyzing those data, and then using that analysis as a basis for a follow-up survey of expert trainers. The novices identified their training delivery problems and the experts provided solutions to those problems. An overview of the general research methodology is as follows: (1) survey trainers to determine the most frequent training delivery problems they experienced as novices; (2) analyze survey data and synthesize results into ten to fifteen common delivery problems; (3) identify experts to respond to the frequent training delivery problems experienced by novice trainers; (4) survey the training experts through a questionnaire on how they handle the identified problems; (5) analyze the survey data and synthesize the results into core solutions to the

training delivery problems; (6) prepare job aids listing the frequent training delivery problems, general solutions, and specific solutions; and (7) prepare the final report.

Survey of Novice Trainers

A simple, open-ended questionnaire was developed to determine the training delivery problems most frequently encountered by novice trainers. People working in their first two years as trainers were considered novices. Questions covered basic demographic information and problems the respondents encountered during their first two years on the job. The following open-ended question was then used: *As a beginning trainer, what problems or difficulties did you encounter during the delivery phase (or presentation) of training? Please be specific. Feel free to use the other side of this questionnaire if you need more room to write your answer.* The first draft survey questionnaire was pilot-tested with twenty-five students in a graduate-level University of Minnesota training class and then revised.

The final questionnaire was sent to the 984 members of the southern Minnesota chapter of the American Society for Training and Development. The majority of members, with less than four years of experience, are widely representative of the training and development profession. Of the 984 forms that were mailed, 420 (43 percent) were returned. Some of the returned forms were unusable for various reasons (for example, they were blank, problems were not listed, they were returned too late, and so on). The 371 (38 percent) usable questionnaires provided the data for the analysis. A list of 1,098 training delivery problems was derived from these 371 usable questionnaires.

Each of the 1,098 training delivery problems was printed on a note card and sorted into categories. The method used for sorting the data is known as the KJ Method: Affinity Diagrams (Mizuno, 1988). This method, developed by Kawakita Jiro of the Kawakita Research Institute, is used to analyze large amounts of data that are elusive, confusing, and disorganized. Groupings are made by mutual affinity of the data. The process has seven steps: choose a theme; collect the data; put individual data segments (for example, one training problem) onto separate cards; sort the cards into categories; label each category; draw the diagrams; and present the data.

Essentially, this content analysis technique is a right-brain process (Mizuno, 1988). Those involved in the sorting were directed to use their intuition and creativity to interpret and group the data as opposed to sorting by rigid analysis and rules of reason. Nine people were involved in the sorting process—two HRD university professors, six HRD graduate students, and one professional trainer. As noted, cards that contained similar ideas were grouped together on the basis of their affinity or commonality. After the cards were grouped, each group was labeled. The label consisted of words written on a blank card to conveyed the meaning of the cards in that group. The labeled

groups of cards were then treated as a single card (Mizuno, 1988). This content analysis process took the group approximately four hours.

The twelve training delivery problems were found to have three basic themes: problems pertaining to the trainer; problems pertaining to how the trainer relates to the trainees; and problems pertaining to presentation techniques.

Selection of Expert Trainers

The goal of this aspect of the project was to establish a list of experts in the field of personnel training, specifically, trainers who had distinguished themselves through their outstanding delivery skills. Once we located these experts, we presented them with the list of the twelve most common training delivery problems identified through the first survey and asked them to respond with the specific techniques they use to overcome similar problems when they carry out training presentations.

A variety of distinctions can be drawn between novices and experts. The major differences are accounted for by knowledge and experience. Because experts have a broader knowledge base than novices, they solve problems in a different manner. Experts have more focus, recognize cues that allow them to recall "chunks" of information, and are better able to integrate and interconnect knowledge (Bereiter and Scardamalia, 1993). The knowledge that novices possess may be descriptive at a superficial level. In contrast, experts are able to troubleshoot and interpret information. By using cues to access the stored knowledge they possess, experts are able to assess the situation at hand and devise an action plan that will work effectively (Thomas, 1988).

The pool of potential experts for this study included practitioners who had a minimum of five years of experience and were recognized by colleagues or academicians as successful trainers. A nomination form was sent to the eight officers of the southern Minnesota chapter of the American Society for Training and Development to obtain names of experts. The twelve-member Human Resource Development faculty at the University of Minnesota were also asked to nominate experts. We sent an identical form to both groups, asking them to nominate up to six people whom they considered to be expert "deliverers" of training, along with the nominees' company name, address, and telephone number. Three association officers responded with fifteen names while the university faculty produced six responses and twenty-eight names. The total of forty-three names was reduced to thirty-six because of duplication.

Survey of Expert Trainers

Questionnaires were then sent to the thirty-six identified experts, who were asked to explain how they handled the twelve training delivery problems that had been identified by the novice trainers.

Twenty surveys—56 percent of those sent out—were returned. Most of the experts responded in detail to all of the questions. The responses were typed and sorted into categories and, again, responses were grouped and named using the KJ Method (Mizuno, 1988). The solutions that appeared most frequently for each difficult training delivery situation became the basis for the final list of solutions from the experts.

Analysis of Data

The primary data analysis revolved around the 1,089 training delivery problems specified by the 371 novice trainers through the survey questionnaire. A composite list of twelve to fifteen general training delivery problems had been compiled when the teams of experts finished sorting their portion of the problems according to the KJ Method. Along the way, the team members wrote a list on a chalkboard, explained the problems to the other members, and described the rationale behind each respective problem. A two-axis problem-analyst matrix was developed to synthesize the topics into twelve training delivery problems.

The final list that emerged contained the summaries of the training delivery problem information collected by the first survey. The synthesis of this analysis resulted in the "Twelve Most Common Training Delivery Problems of Novice Trainers." The problems are as follows:

1. *Fear.* Novice trainers lack confidence and feel anxious during the delivery of training.
2. *Credibility.* Novice trainers perceive that they lack credibility as subject matter experts with the learners.
3. *Personal experiences.* Novice trainers don't have stories about personal experiences to incorporate into the training in order to relate to a specific organization or subject matter.
4. *Difficult learners.* The trainers have trouble knowing how to handle a trainee who presents a behavior problem. This kind of trainee may be angry, passive, or dominating.
5. *Participation.* The trainers have trouble getting people to participate.
6. *Timing.* Novice trainers have trouble with timing or pacing the training, and not rushing through the material. They also worry about having too much or too little material to present.
7. *Adjusting instruction.* Beginning trainers find it difficult to adjust the training to the needs of the learners, or to redesign the presentation during delivery.
8. *Questions.* Beginning trainers have difficulty in using the questioning technique effectively as well as in responding to difficult or unanswerable questions.
9. *Feedback.* Beginning trainers are unable to "read" the trainees in order to make adjustments and use formative evaluations effectively.

10. *Media, materials, facilities.* The trainers are concerned about how to use media and materials effectively, as well as how to take care of the breakdowns that occur in these areas.

11. *Opening, closing techniques.* Novice trainers need techniques to use both as icebreakers and introductions and as effective summaries and closings.

12. *Dependency on notes.* Beginning trainers feel too dependent on notes and have trouble determining ways to present information without them.

As noted earlier, the second survey asked experts to propose solutions for handling these problems. This survey resulted in the "Expert Solutions to the Twelve Most Common Delivery Problems of Beginning Trainers," a topical outline that synthesizes the solutions from the twenty experts against the training delivery problems of the novices. The solutions that appeared most frequently (were cited three or more times) for each difficult training delivery situation became the basis for the final list of expert solutions. Most problems ended up with three to four solutions. The combined data from the two surveys is presented in Exhibit 1.

Summary and Conclusions

This study had three major purposes: to determine what novice personnel trainers considered to be the most frequent training delivery problems they faced; to determine how experts respond to these problems with solutions they have found to be effective; and to present the findings in a manner useful for practitioners and when training and coaching novice trainers.

The conclusions from each of the two sequential and distinct surveys within the study formed the research base for the major outcomes, which were the most common training delivery problems novice trainers experience and the expert solutions to these problems. We recommend that these findings serve as a basis for training trainers. Beginning trainers can use the delivery and solution findings for self-assessment. In addition, they can plan for and execute the strategies and techniques suggested by the experts in practice sessions. Those who train trainers can also use the problem-and-solution findings to evaluate the effectiveness of new trainers.

Although advice and speculation abounds about best practices in training, little research is available about the numerous practical problems faced by novice personnel trainers. Their problems at the analysis, design, development, and evaluation phases should also be researched following the general methodology of this study. The methodology—surveying novices and experts—used in this study may prove to be helpful in closing the theory-to-practice gap that exists in other phases of the training process. In addition, open-ended survey questions like those used in this study will likely result in excellent responses from both novices and experts, while the problem of dealing with large pools of qualitative data is lessened when content analysis methods such as the KJ Method are used (Mizuno, 1988).

Exhibit 1. Expert Solutions to the Twelve Most Common Training Delivery Problems of Novice Trainers

1. **Fear**
   A. *Be well prepared.* Expert trainers have a detailed lesson plan, understand the material, and practice their presentation.
   B. *Use icebreakers.* Experts use icebreakers and begin with an activity that relaxes participants and gets them to talk and become involved.
   C. *Acknowledge the fear.* Experts understand that fear is normal, confront what makes them afraid, and use positive self-talk or relaxation exercises prior to the presentation.

2. **Credibility**
   A. *Don't apologize.* Experts are honest about their knowledge of the subject matter and explain that they are either experts or conduits.
   B. *Have the attitude of an expert.* Experts are well prepared and well organized. They listen, observe, and apply what they know to what the particpants know.
   C. *Share personal background.* Experts talk about their areas of expertise and the variety of experiences they have had.

3. **Personal Experiences**
   A. *Relate personal experiences.* Experts tell their personal experiences, sometimes asking themselves probing questions to uncover them.
   B. *Report experiences of others.* Experts collect pertinent stories and incidents from other people and/or have participants share their experiences.
   C. *Use analogies, refer to movies or famous people.* Experts use familiar incidents and situations to relate to the subject.

4. **Difficult Learners**
   A. *Confront the problem learner.* Experts use humor. They may also talk to the individual during a break to determine the problem or to ask the person to leave.
   B. *Circumvent dominating behavior.* Experts use nonverbal behavior, such as breaking eye contact or standing with their backs to the person and inviting the others to participate.
   C. *Use small groups to overcome timid behavior.* Experts find that quiet people feel more comfortable talking in small groups or dyads and so structure exercises where a wide range of participation is encouraged.

5. **Participation**
   A. *Ask open-ended questions.* Experts incorporate questions into the lesson plans and provide positive feedback when people do participate.
   B. *Plan small-group activities.* Experts use dyads, case studies, and role plays to allow people to feel comfortable, to reduce fears, and to increase participation.
   C. *Invite participation.* Experts structure activities that allow people to share at an early time in the presentation.

6. **Timing**
   A. *Plan well.* Experts plan for too much material, and some parts of the material are expendable. They prioritize activities so that parts may be omitted, if necessary.
   B. *Practice, practice, practice.* Experts practice the material many times so they know where they should be at 15-minute intervals. They make sure there's a clock in the training room.

7. **Adjust Instruction**
   A. *Know group needs.* Experts determine the needs of the group at an early time in the training and structure activities and processes based on those needs.
   B. *Request feedback.* Experts watch for signs of boredom and ask participants how they feel about the training either during the breaks or periodically during the session.
   C. *Redesign during breaks.* Experts find it helpful to have contingency plans and, if necessary, to redesign the program during a break. Redesigning during delivery is not advocated.

8. **Questions**

Answering questions:

A. *Anticipate questions.* Experts prepare by putting themselves in the participant's place and by writing out key questions learners might have.

B. *Paraphrase learners' questions.* Experts repeat and paraphrase participants' questions to ensure that everyone has heard the question and understands them.

C. *"I don't know" is okay.* Experts redirect questions they can't answer back to the group's expertise. They try to locate answers during breaks.

Asking questions:

A. *Ask concise questions.* Questions are a great tool for experts. They ask concise, simple questions and provide enough time for participants to answer.

9. **Feedback**

A. *Solicit informal feedback.* Experts ask participants, either during class or at the break, if the training is meeting their needs and expectations. They also watch for nonverbal cues.

B. *Do summative evaluations.* Experts have participants fill out forms at the conclusion of training to determine if the objectives and needs of the group were met.

10. **Media, Materials, Facilities**

Media:

A. *Know equipment.* Experts know how to operate every piece of equipment that they use.

B. *Have backups.* Experts carry a survival kit of extra bulbs, extension cords, markers, tape, and so on. They also bring the information they are presenting in another medium.

C. *Enlist assistance.* Experts are honest with the group if there is a breakdown and ask if anyone can be of assistance.

Materials:

A. *Be prepared.* Experts have all materials ready and placed at each participant's workplace or stacked for distribution.

Facilities:

A. *Visit facility beforehand.* Experts visit a new facility ahead of time, if possible, to see the layout of the room and to get an idea of where things are located and how to set up.

B. *Arrive early.* Experts arrive at least one hour in advance to ensure enough time for setting up and handling problems.

11. **Openings and Closings**

Openings:

A. *Develop an "openings file."* Experts rely on many sources for icebreaker ideas. Through observation and experimentation, they develop ideas and keep a file of them.

B. *Memorize.* Experts develop a great opening and memorize it.

C. *Relax trainees.* Experts greet people as they enter, take time for introductions, and create a relaxed atmosphere.

Closings:

A. *Summarize concisely.* Experts simply and concisely summarize the contents of the course, using objectives or the initial model.

B. *Thank participants.* Experts thank participants for their time and their contributions to the course.

12. **Dependence on Notes**

A. *Notes are necessary.* Experts recognize that no one completely outgrows the need for notes.

B. *Use cards.* Experts scale down their presentations to an outline or key words, which they write down on note cards to use as prompts.

C. *Use visuals.* Experts make notes on frames of transparencies and on their copies of handouts.

D. *Practice.* Experts learn the script well so that they can deliver it from the keyword note cards.

Note: Problems based on a survey of 371 novices; solutions based on a survey of 20 experts.

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