

PART ONE

Prepare for Effective Trainings Every Time

Overview

The Five Pillars of the TrainSmart Model

1. Engage—Prepare the Mind for Learning
2. Frame—Establish the Relevance of the Learning Material
3. Explore—Involve and Engage Participants in the Material
4. Debrief—Consolidate the Learning
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The Bricks and Mortar of the TrainSmart Model

The Bricks . . .

1. *Teach People, Not Content*
2. *Awareness Leads to Choice*
3. *Learning + Enjoyment = Retention*
4. *Application Is Everything*
5. *Stories Work*

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. . . and Mortar

1. *Crest of the Wave*
2. *Frames Create Meaning*
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A Sample TrainSmart Schedule

Overview

Although *TrainSmart* covers a great deal of territory, you'll find you can internalize the principles and strategies swiftly because they're inherent to how the brain naturally learns best. Therefore, they should make *perfect sense* to you. And, perhaps most important, they will give your participants a better chance of learning and even allow them to enjoy the experience.

As you begin journeying into TrainSmart territory, you'll probably start thinking about how to apply the strategies to your own training, so the book includes spaces for you to jot down your ideas as you go.

Part One introduces you to the TrainSmart approach—the pillars and foundation upon which the model is built.

Part Two outlines the twenty-five Key Concepts that transform the model into practical applications you can implement immediately.

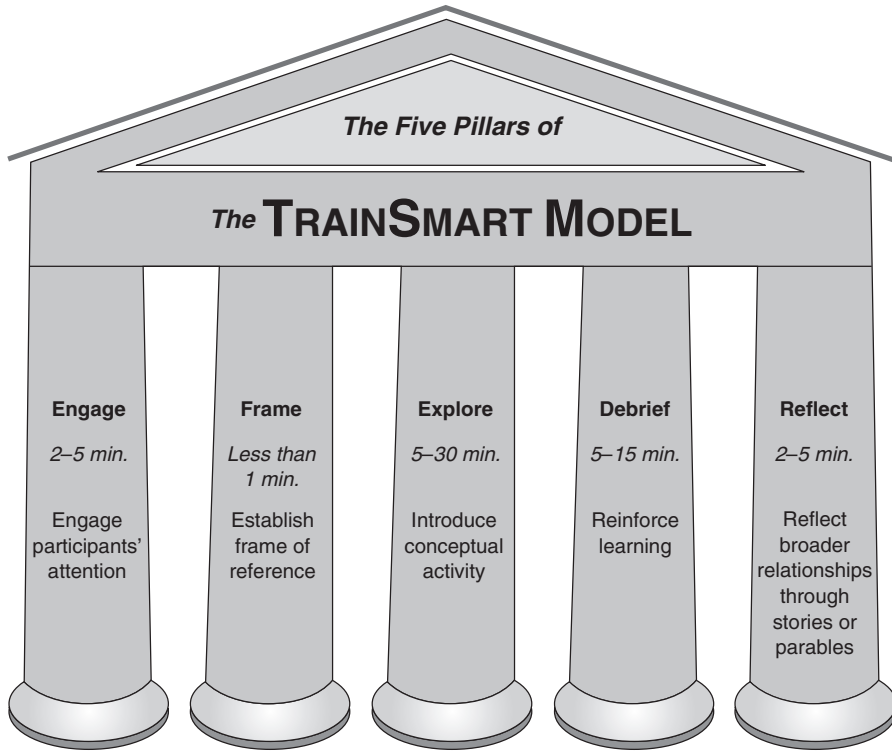
Part Three presents a handful of powerful parables that will linger in the minds of your learners long after your closing remarks. It also concludes with a checklist and a lesson plan template to help you build the TrainSmart strategies into your own training.

The TrainSmart strategies are based on my twenty-five years of experience as a trainer and educator; they have been tested and proven by teachers and trainers all over the world. Together, they form a model that reflects the art and science of *training smarter, not harder*. Let's take a closer look.

The Five Pillars of the TrainSmart Model

TrainSmart uses the term *model* to mean “a preliminary construction that serves as a plan from which a final product is made,” so you need

Figure 1.1 The Five Pillars of the TrainSmart Model



to customize it to meet the requirements of your particular training situation. In other words, the TrainSmart model gives you only a basic framework: it requires *your* creativity, planning, and purposeful action to make it work.

The five pillars in Figure 1.1 represent the action steps of the TrainSmart model. Ideally, you should include them in every training plan. Of course, *how* and *when* you incorporate them will depend on your own personal style, objectives, environment, and experience.

1. Engage—Prepare the Mind for Learning

This step doubles as an *energizer* and/or an *icebreaker* if needed. However, its primary purpose is to mentally prepare participants for the learning session ahead. In this step, we bring participants into the moment, screen out distractions, remove the anxiety of being in an unfamiliar setting, and focus their brains.

2. Frame—Establish the Relevance of the Learning Material

This step allows us both to address participants' concerns, so they can concentrate on learning, and explain the immediate learning objective(s). It should answer such questions as:

- Why am I here?
- What am I supposed to learn?
- How is this information important to me?
- How will this new knowledge benefit me either personally or professionally?

3. Explore—Involve and Engage Participants in the Material

This active step introduces participants to the key content of our training—not by telling them about it, but by involving them in it. Good exploration activities involve sensory experiences and attention to a variety of learning styles and multiple intelligences. This type of active exploration is vital because when we stimulate participants on multiple levels—physically, mentally, socially, and/or emotionally—we improve their comprehension and recall.

4. Debrief—Consolidate the Learning

This step highlights and reinforces the key points of our training. It typically involves facilitating participant dialogue and/or interaction relating to the prior exploration activity. This step also helps us to determine what content participants have internalized and where we need to elaborate further. The key in this stage is to *guide* participants toward a clear understanding of the content.

5. Reflect—Embed the Learning

The reflection step often incorporates a parable, personal example, or metaphor to illustrate the concept in a real-life context. It's where we help participants identify the broader meaning of the content. Ideally, it should leave learners with a deep and lasting impression of the material.

The real-life example on the following page illustrates what the TrainSmart model might look like when incorporated into a sales seminar for realtors.

A Real-Life Training Example

What:

A sales seminar for realtors

Purpose:

Train new realtors in the art of building relationships with customers

Action Steps:**Engage**

Ask participants to pair up and simulate a situation in which they're meeting each other for the first time. Have the pairs decide which of them will play the part of the realtor and which the client. Either meet with the realtors briefly or pass a card to each of them explaining their specific role—that of a very rude salesperson. When the role play gets under way, the client is baffled as she or he attempts to make a positive contact. This unexpected exercise gets everyone laughing and helps to release the anxiety inherent in a new learning environment.

Frame

Use a PowerPoint slide or flip-chart diagram to illustrate "The Anatomy of a Real Estate Sale." The diagram reflects the areas of content that will be covered in the training. Explain the value of the skill they are about to learn and how it will be of benefit to them.

Explore

After a brief explanation of the brainstorming process, divide the audience into small groups to brainstorm the essential elements of a successful first contact between a realtor and potential client. Ask a volunteer in each group to record the ideas generated by the group. Afterward, have the groups share their responses with the entire class. Then ask for volunteer pairs to demonstrate a refined first contact for the class, this time incorporating as many positive elements as possible.

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Debrief

As a follow-up to the exploration activity, ask the seated participants to evaluate the scene they've just observed. Provide guiding questions such as, (1) What worked? (2) What didn't work? (3) Would you have done anything differently? (4) Would you have been impressed if you were the client? Then pose broader questions such as, (5) Is there a single *correct* way to greet a new client? (6) What might you want to consider when sizing up the client and steering the interaction? Rather than *telling* them, *guide* participants toward the appropriate shifts in thinking.

Reflect

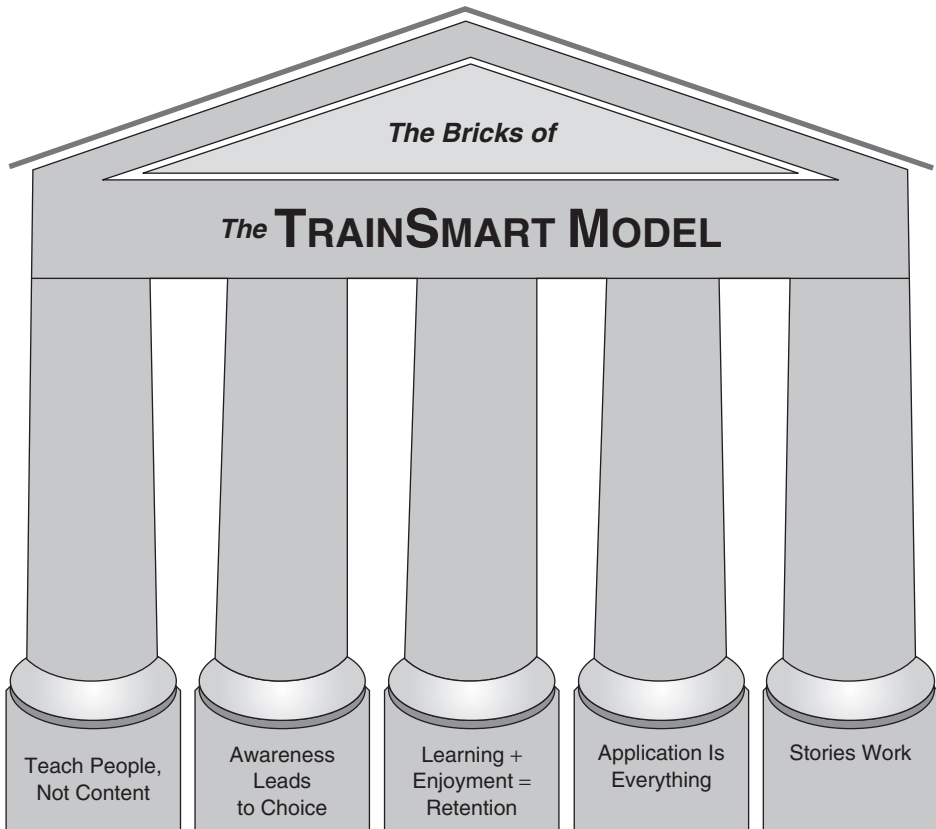
Write an astronomical sum up on the board. Explain that the figure represents the amount of money lost in the deals that fell through as a result of the groups' ineffective initial contacts. Then distribute a synthetic million-dollar bill to each member of the group and say, "Now this reflects your subsequent financial success as a result of your newly perfected greeting skills." Conclude this part of the training with an account of a personal experience in which a friendly greeting you extended to a seat-mate on a flight to Hawaii resulted in a five-million-dollar sale (or your own version of a related story).

The Bricks and Mortar of the TrainSmart Model

This section introduces ten fundamental aspects of the TrainSmart approach to training. It is divided into two parts. First, we'll look at five critical beliefs that comprise the building blocks of the model—the "bricks." Then we'll examine five guiding principles of effective training that hold it all together—the "mortar." These beliefs and principles are the foundation of the TrainSmart model. Let's review them one brick at a time.

1. Teach People, Not Content

Undeniably, content is important. After all, it's the primary reason why companies invest in training. However, TrainSmart recognizes

Figure 1.2 The Bricks of the TrainSmart Model

that content means very little outside a *human* context. It's based on the idea that learners are, first and foremost, *people*, and *their* needs come first. The point is, people simply won't learn until we truly take their needs into account. If we are sensitive to the needs of the group and respect each individual, we will foster the type of safe and trusting environment that supports optimal learning.

To teach people, not content, we must ensure they

- are physically and socially comfortable;
- can see how the content is relevant to their life and work; and
- feel emotionally safe.

Maintaining a focus on *people first* requires us to shift our thinking away from the traditional view of learning where "pupils" listen to

GOOD TEACHERS ARE ALWAYS LEARNING FROM THEIR STUDENTS.



their “teacher.” In other words, we don’t teach *to* people, we teach *with* them. Training *to* a group assumes instruction happens only in one direction—from the trainer to the participants. Training *with* a group acknowledges that learning is bilateral—it’s an exchange between individuals. Thus the TrainSmart framework acknowledges that the trainer’s viewpoint is not the *only* valid one.

2. Awareness Leads to Choice

Given all they know, people always make the best choice available to them.

This statement introduces the idea that our job as trainers is to give participants additional “choices.” The way participants choose to approach a problem will depend on the number of ways they are *aware* the problem can be tackled. If they are aware of only one approach, that’s the one they’ll use.

Consider the analogy of a tool kit. If we have only a hammer, we'll try to use it to solve every carpentry task. But if someone gives us a screwdriver and shows us how to use it, we'll get a lot better at putting in screws!

When we teach, we broaden the range of choices participants have by making them aware they have other options. In other words, we add to their "skills tool kit" by showing them new ideas and how to apply them.

This idea is important to us as teachers. It focuses us on the fundamental point that if participants have an alternative way of doing something that seems better to them—or that they are more comfortable with—they will choose this. Therefore, if we want them to learn to do something differently, we must demonstrate the usefulness of the new approach and show how it complements their existing skills.

3. Learning + Enjoyment = Retention

Cognitive scientists agree that emotions have a significant effect on our recall. Think about it: what do you remember from your own childhood? If you're like most people, your most durable memories fall into one of two distinct categories: times of great pleasure or great pain.

As trainers, we rarely use negative emotions to influence recall—unless, of course, we're running a boot camp! However, we can greatly improve participants' recall by connecting content with positive emotions by using humor, joy, and playful interaction within our training.

For example, instead of teaching a concept by merely talking about it, try introducing participants to its relevance using an intriguing interactive exercise. You'll find many of these illustrated throughout the book.

A word of warning: we need to handle people's emotions *carefully*. For example, many people may have had bad experiences with humor in the teaching environment. While people love to laugh at a joke, they don't want to *be* one.

So be sure to keep playful interactions meaningful and work to create a learning environment based on emotional safety and mutual respect. Then you can use positive emotions to help participants make deep and powerful connections with the content. Think back to your childhood: did you ever truly master anything that you didn't enjoy?

WHAT WE LEARN WITH PLEASURE, WE NEVER FORGET.



4. Application Is Everything

Learners need to apply new knowledge to their own, unique situations. Demonstrating the validity or usefulness of the knowledge through association with concrete examples and real-life encounters not only helps participants understand and apply the content, it also helps them remember it!

*Nothing is taught if nothing is learned.
And nothing is learned if nothing is applied.*

You can show participants how to apply content through small-group exercises, games, case studies, brain twisters, and role plays. Facilitating such interactions frequently helps participants understand how to use their new knowledge.

I sometimes open a lesson by posing a problem. I might say, "Please help me identify what's wrong with the following situation." In this case, the application becomes the starting point of the presentation. Then we look at variations on the problem and discuss ways to address it.

5. Stories Work

Long before there were books or movies or computers, there were stories—metaphorical tales that acted as the repository of a culture’s collective wisdom. The storytellers of ancient communities were among the most revered and venerated of citizens, because civilizations depended on the verbal tradition of passing knowledge to the next generation. Today, stories remain a powerful means of transferring knowledge. Good trainers use them all the time when sharing case studies, personal experiences, news articles, metaphors, and jokes.

All of these story devices can teach us something about the world, while simultaneously triggering our emotions, tapping into our unconscious, and stimulating visual images that foster recall. Of course, we can always use more stories—and you’ll find some at the back of this book. But remember: our own lives are full of potential parables—all we need to do is see through the eyes of a storyteller.

Now let’s take a look at the principles that hold the bricks of the TrainSmart model together.

1. Crest of the Wave

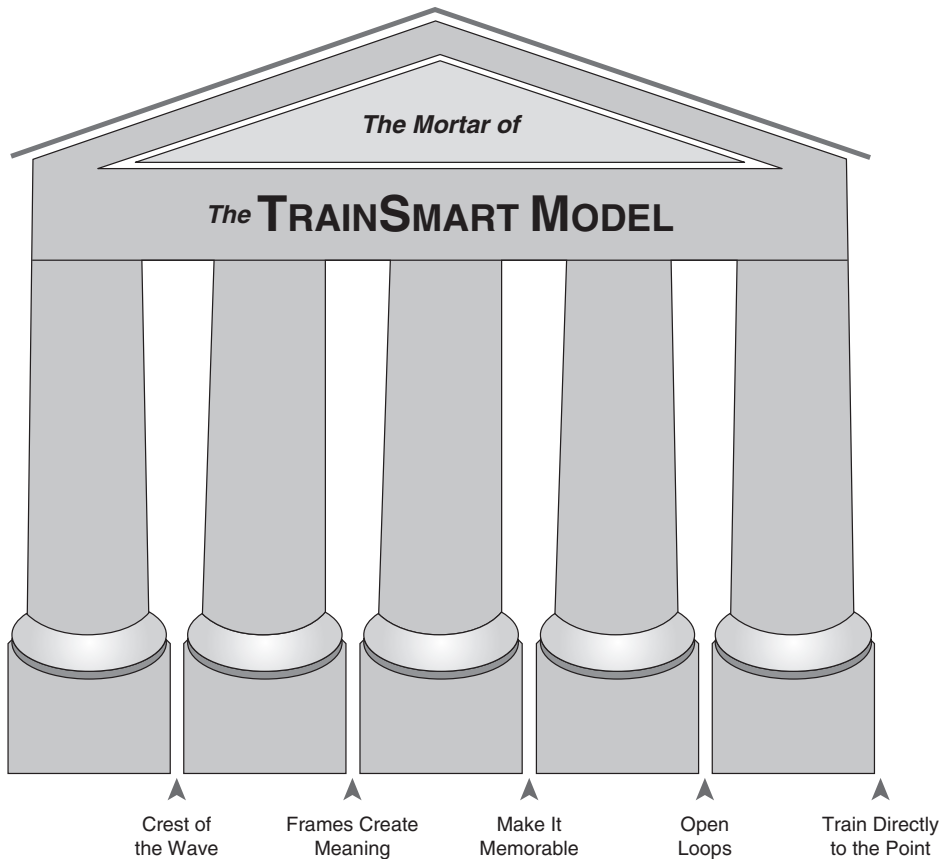
Way out in the distance, a swell begins to build. It is slow and steady at first, gradually gaining height and momentum as it moves ever closer to shore. Arching to a crest, the wave reaches critical mass, peaks, and crashes down over itself. The water rolls forward and finally dissipates as it washes up on the sandy shore. This is the natural rhythm of the learning process in the training room.

Simply put, much like waves building, peaking, then crashing down, there are swells, crests, and tumbles in the training environment. When learners reach the end of their ability to draw useful information from a given mode of instruction, they reach the *crest of the wave*. At this point, we need to change the manner of instruction to refocus their interest and attention.

This means we need to observe and listen to the room. What is the sound level? Are participants on or off task? Are they sitting on the edge of their seats or rocking back and forth in them? What is the energy level? Is it time for a change of pace? Do learners need to move around or take a break? These are questions we must ask ourselves moment by moment. If we ignore these vital cues, participants may grow increasingly uncomfortable, hesitant, and resistant.

The point is: training is a dynamic art. We need to be constantly responsive to the waves of interest in the room, stay present in the moment, and respond to the energy and reactions of the participants.

Figure 1.3 The Mortar of the TrainSmart Model



Even when the many environmental factors that impact a training session are perfect—the room temperature, furniture arrangement, and type of equipment—the question still remains . . .

How long can participants effectively pay attention?

While answers will always vary among individuals and situations, my experience is that adults can fully pay attention in a new learning situation for only about fifteen minutes at a time. In fact, if we expect participants to sit still for too long, they quickly become tired and find it hard to focus.

So what does this mean to us as trainers?

It means we need to provide strategic brief energy breaks in the form of mental or physical “state changes” about every fifteen

minutes—or sooner if we sense the room beginning to “crest.” To do that, it helps to think of each session as a menu with hors d’oeuvres, a main course, and dessert. Between courses, provide state changes and movement activities to avoid overloading participants with information.

It is vital not to overload participants. Given the volume of information trainers have to deliver, it’s tempting to continue to speak past the point where participants can effectively absorb new content. Instead, once the wave crests, we need to allow participants the time to process new information through a variety of modalities (talking, reading, editing notes, brainstorming, or watching a video). This sets up a win-win situation: on the one hand, participants make connections and consolidate information for long-term memory; on the other, we trainers can assess learning progress—not to mention taking a break ourselves!

As a result, everyone comes back refreshed and refocused. This is what *training smarter* is all about.

*If you’re not riding the crest of the wave,
chances are you may find yourself beneath it.*

2. Frames Create Meaning

Consider the following scenario. A trainer introduces an exercise with only one brief remark, “Welcome to The Maze! Here’s how the game is played.” He then explains how to play the game, but learners are skeptical and hesitant about participating. Why might this happen?

On closer inspection, we can see the trainer did not effectively *frame* the activity. Learners are busy wondering: why should we do this? What’s the point? How does this relate to me, the topic, or my work? Without a frame, participants understandably decide the activity is irrelevant and turn their attention elsewhere.

The next day, the trainer decides to try a different approach. He introduces the activity to a new group like this: “Welcome to The Maze! The Maze is a puzzle. As we solve it, some issues may emerge that we can talk about later as a group and learn from.”

With this frame, participants are able to grasp the learning purpose and significance of the exercise. They prepare themselves for the activity and the discussion to follow. The frame has successfully provided meaning.

IT'S MORE EFFECTIVE TO TEACH TO THE CREST



3. Make It Memorable

We need to present material in a way that helps participants to remember it easily and naturally. This sounds self-evident, but the problem is that our own familiarity with the material gives us the edge in creating a memory strategy suitable for retaining it. Learners, on the other hand, must first *comprehend* the new material before they can remember it.

You'll find memory strategies throughout *TrainSmart*, but here's a quick synopsis.

We've already talked about the value of storytelling and engaging emotions. In addition, you can help learners remember important concepts by linking the concepts with images or with mnemonic strategies, such as acrostics and acronyms.

For example, the acronym HOMES has helped many U.S. children learn the names of America's five Great Lakes: Huron, Ontario, Michigan, Erie, and Superior. Similarly, almost every American youngster, for example, has learned the alphabet to the tune of "Twinkle, Twinkle, Little Star." While primarily used today by

younger learners, mnemonic techniques work with people of all ages. Everyone remembers more when the brain is provided with additional connections and cues.

Another memory strategy you'll discover in *TrainSmart* is *involving* participants in the learning, rather than *telling* them about it. You can involve people through discussion, role plays or exercises that allow participants to "discover" the content themselves. Or you can involve them in the teaching process itself.

If you really want to know something, teach it.

Asking participants to teach or lead aspects of the training is a highly effective technique for enhancing recall. Even getting participants to share their level of prior learning or experience with the subject early in the training will engage and stimulate recall by building on prior knowledge.

Finally, one of the best things you can do to help participants remember is to limit your content to what is digestible in the allotted time. Remember: when the wave crests, people stop learning.

Before you finalize your training plan, ask yourself the question: how memorable is it?

4. Open Loops

It was the first morning of a two-day technical training seminar. Participants were learning to repair a new walkie-talkie that would soon be sold in stores. At the start of the session, the trainer passed out a walkie-talkie to each person. When all the participants had received one, she asked that they turn them on. None of the units worked. She then said, "Each device has some sort of problem: I personally saw to that. Now, here's a twenty dollar bill. If you can fix your walkie-talkie, or anyone's around you in the next five minutes, the money is yours. Your five-minute countdown begins now."

The trainees launched into the repair process—taking their walkie-talkies apart, interacting with others around them, and problem solving. When the five-minute time period was up, none of the units had been repaired. "OK," said the trainer, "now let's learn how to make some money fixing these things." All eyes were on her, and it was clear that she had successfully employed the powerful training strategy known as an *open loop*.

An open loop is any statement, action, visual device, or other event that gives participants foreknowledge of what is coming.

Trainers use open loops to set the stage for what is about to happen, elicit curiosity, and build suspense.

There are many ways to achieve this effect. You can do it with visuals, such as signs or posters placed around the room, or with a message displayed on the board or screen. A guitar placed in plain view, but not mentioned, can serve as an open loop until it is used later. Or perhaps you might leave a box in plain view with a variety of colorful supplies poking out. You can use any event that arouses anticipation to create an open loop.

Open loops are wonderful training devices because they create a dynamic that participants find irresistible: they need to “close the loop.” Consider this metaphor: have you ever been in a car listening to one of your favorite songs when, just before it ends, the DJ fades it out or begins speaking over the ending? Isn’t that annoying? What annoys us is that the loop doesn’t close. The longer we listen to the song, the stronger the loop becomes, and the more dissatisfaction we feel when it is cut short. Once a loop has been opened, it is human nature to want to close it.

Open loops have universal appeal. They form the plot of most fictional best sellers and are exploited by advertisers. For example, colorful advertisements for exotic destinations can create the desire to travel; the only way to close the loop is to book a vacation.

While open loops come in many shapes and colors, their common denominator is that they alert participants to what is coming and its potential value. This both focuses their attention on receiving the new information and helps them remember it.

A couple of warnings: using loops can be an effective component of your learning strategy, but they are never the entire strategy. Most important, remember that when you open a loop, you’ve eventually got to close it!

5. Train Directly to the Point

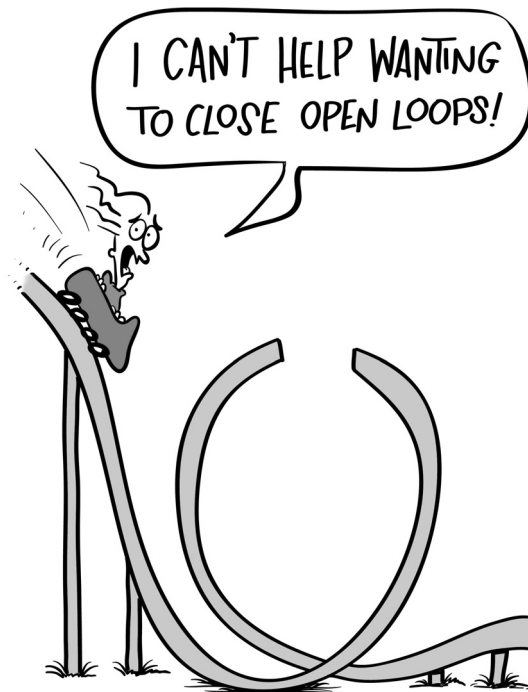
A little knowledge, as the saying goes, can be a dangerous thing. In the training setting, however, *a lot* of knowledge can be an *even more* dangerous thing. Why? Because we forget one of the basic rules of effective instruction: *train directly to the point!* So limit your information with a simple question: does it support participants in understanding the topic? If it doesn’t, no matter how entertaining or interesting, it probably doesn’t need to be there. The following example illustrates this important principle.

The class was billed as an introduction to the company's revised e-mail system. It was geared toward staff members who had little or no experience working with the new program. The trainer was a young man who had been working with computers for most of his life. As participants filed in, he guided each of them to a computer station.

"I'd like to start by saying that using this program is really easy. You'll get the hang of it in no time at all, and pretty soon you'll be able to move right on to some of the more interesting aspects of it, such as creating multiple client lists you can simultaneously e-mail, creating a personalized signature, and building databases where you can cross reference the critical needs of some of our important companies. Why, you can even . . ."

However, by this point he had already lost the attention of most of the participants. Although he spoke with enthusiasm, they were intimidated and unfamiliar with the trainer's language. He had intended to create a sense of excitement in the room. However, by introducing too much new information too rapidly, he had unintentionally created the opposite effect.

After the lack of success in his first session, the trainer decided to make some changes. The next time the training was conducted, he



was better prepared and decided to use the principle of *training directly to the point*. The first thing he said was, “Welcome. Thank you for coming. Please begin by opening the new e-mail program on your computer. Here’s how that’s done . . . ”

At this point, he waited patiently while participants located the appropriate icon. It took a little time, but finally everyone had the new program open and running on their computer. Next he showed them how to send a message, and asked that they all send one to him. When this had been successfully accomplished, he had them send a brief message to each other, and showed them how to send a reply. He continued like this throughout the session, at each point introducing only what the participants needed to know, and not moving forward until everyone had successfully completed each step. In the end, 100 percent of participants achieved the course objectives!

How were the original and revised approaches different? In the revised approach, the trainer took into account the needs and experience levels of the participants, and geared the instruction accordingly. The bottom line? Avoid the temptation to add unnecessary information: *train directly to the point*.

A Sample TrainSmart Schedule

Morning Session (Part 1)

- **Arrival:** Have upbeat music playing as participants enter the training area and get themselves settled.
- **Welcome and Greet:** Create involvement through various activities in which participants meet each other.
- **Content Introduction:** Introduce the colorful posters on the walls and have participants take a quick trip around the room to review them. The posters should reflect the key concepts of the training.
- **Opening Parable:** Tell a story that sets the scene or mood for the day. For example, you might share “The Traveler” (see parables in Part Three) to symbolize the importance of being open to new ideas and not rushing to judgment.
- **Distribution of Resources:** Before the training begins, hide the workbooks somewhere in the room. Now have participants “gather their first gem” by standing up and finding a workbook. This activity doubles as a state-changer and as a way to get the blood moving a little bit.

- **Plant an Open Loop:** Mention to participants that they might surprise themselves before the day is done. Hint that something intriguing will happen after lunch.
- **First Exploration:** Introduce/frame the activity before you begin.
- **Debriefing:** Ask the participants to write down at least three emotions they experienced while engaged in the exploration activity. Afterward, ask for volunteers to share their ideas. Record these ideas on a flip-chart.

–Morning Break–

Morning Session (Part 2)

- **Engager:** Bring participants back and refocus their attention with a brief two-minute energizer.
- **Second Exploration:** Introduce/frame the activity.
- **Application:** Have participants pair up and consider how they might apply the learning to their work or home lives. Subsequent to the pair share, regroup and ask participants to share their responses while you once again record them on a flip-chart page.
- **Make It Memorable:** Give participants the last five minutes of the morning to make notes about the most important concepts they've learned and how they might apply them personally and professionally.

–Lunch Break–

Afternoon Session (Part 1)

- **Engager:** Engage learners physically with a brief activity that is mildly active and encourages social interaction.
- **Close Open Loop:** Remind participants about the intriguing after-lunch activity, and then tell them they—not you—will be teaching the rest of the session.
- **Exploration:** Have participants meet in small groups. Provide each group with an index card describing a pertinent concept learned in the morning session and with instructions for planning a five-minute lesson based on that concept. Allow a set period of time in which to plan and practice the lesson they will be presenting to the rest of the group.

–Afternoon Break–

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Afternoon Session (Part 2)

- **Final Energizer:** Have learners create and post “mind maps” related to the material they’ve been learning.
- **Application:** Have the groups present their five-minute lessons.
- **Debriefing:** After the presentations, ask the class to provide feedback about what they felt worked and what didn’t. This is also the time when the various pieces of the training are pulled together for a final recap.
- **Review:** Have participants stand up and review all of the posters on the walls. Provide index cards for them to record any final questions that they have. This is also a good time for participants to answer each other’s questions as they walk around and discuss the posters and mind maps.
- **Ownership:** Ask everyone to complete a session evaluation that focuses on what they felt they received the most value from, and that elicits ideas for how the course could be made even better in the future.
- **Closing Parable:** End with a story that reinforces your underlying theme. For example, you might tell the “Animal School” parable (see parables in Part Three) to reinforce the importance of training to an individual’s strengths as opposed to forcing a square peg into a round hole. We all have natural gifts, we just need to recognize and strengthen them.
- **Closing Remarks:** Play some upbeat, inspiring music as you thank and acknowledge participants for their energy, enthusiasm, and attention.

This hypothetical training schedule demonstrates how the TrainSmart model looks in practice. Certainly, there are thousands of ways to translate the principles and/or modify them. The bottom line? *Engage, Frame, Explore, Debrief, and Reflect!*