Practical **A**id **M**emoirs for the workplace

PAM 2

Training

'Establish and maintain the learning space'

Communication   Training   Improvements

Forward

The decision to write this series of PAMs was taken after witnessing and experiencing the absence of aide memoirs at work to help jog the memory or provide some guidance. Sometimes people just need a reminder, a nudge to get them along the way again. The PAMs provide sufficient information to allow the reader to easily digest the content and put it into practice at the workplace.

Essentially, Practical Aide Memoirs are just that, practical. The PAMs are intended to assist planning, decision making and action. The resultant action is intended to improve the workplace performance of individuals and teams, lifting those Key Performance Indicators, sustainably. The PAMs are about creating an environment of success.

PAM 1 is about laying the foundations. PAM 1 starts with the individual, then places the individual within and around the team. The team function is examined, and we look at motivation. PAM 1 also makes clear the distinction between leaders, managers and roles. Throughout PAM 1 there is an emphasis on communication skills, an orientation towards objectives and outcomes, and reflective practice.

PAM 2 puts the framework in place. It establishes and maintains the learning environment and sets in place a culture of personal and professional development. PAM 2 presents 'Train the Trainer' (TTT) and 'Job Instruction Training' (JIT). Workplace training should be delivered in the most efficient and effective way so that training interventions are beneficial for everyone involved. The company benefits from having staff trained to a high standard, not simply for the sake of training but to add to the quality of work being done and ultimately, profit. Like an accountant, well trained members of staff are a sound investment.

PAM 3 builds on PAMs 1 and 2 and is all about creating an environment of Continuous Improvement. While based on sound Lean and Projects principles, this PAM remains practical due to the principle of being 'applied'; easy to grasp and transferable into the workplace. Applied Lean principles are about keeping things practical, giving ownership and doing what works.

Combined, the PAMs represent a Systems Approach to workplace improvements.

David Browne

Contents

1 Orientation towards training

1.1 PAM 2 (your TTT) looks at factors affecting the learning environment. It considers a range of methods of delivery, including: Work Instructions, Toolbox-Talks, Single Point Sessions, Presentations, Briefings and Workshops etc. Using this PAM as an aid memoir you will be able to deliver training using a range of methods.

1.2 This PAM presents a range of training delivery methods that can be adapted to any workplace situation. The level of detail required will be dependent on your assessment of the need.

1.3 PAM 2 will assist you in the delivery of first-class training, thereby contributing to the overall performance of the company. Application PAM 2 is key to raising standards and achieving your company and departmental goals.

1.4 To start, PAM 2 looks at **factors that affecting training at work**. Resource issues such as equipment and space are considered. Learners and trainers will be influenced by personal preferences when learning or training and so these will be explored in some depth. Communication is a key factor in any learning environment. It is essential the trainer is able to communicate with the learner and deliver feedback effectively and so these topics are also looked at.

1.5 Throughout PAM 2 you are steered towards the delivery of training, the practical application. Of course, the structure of the PAM allows you to go straight to the topic you need and apply it straight away. You should use PAM 2 in support of the delivery of real-time training at the workplace, practicing the range of methods available, (although you will probably find the range of methods available is restricted by the company culture).

1.6 By using PAM 2 will identify where there is a conflict between working practices and what ought to be occurring, according to Standard Operating Procedures (where the training requirement is first identified) and the training given. The PAM Series © shows how to deal with such events effectively and accurately, exploiting opportunities for improvement.

1.7 **Identification of the training requirement** consists of **a Needs Analysis**, **Job Analysis**, an **Options Analysis**, **Programming** and **Scheduling**. These are covered in PAM 2 and the outcome is **Standard Work**. Standard Work ensures efficiency and provides a platform for **Continuous Improvement**.

1.8. Maintaining Standards and ensuring Continuous Improvement is essential to company performance, **and the best way of ensuring that is to provide trainers with the right training**. PAM 2 contributes to that goal.

Activity 1.1 Training Focus

It is useful at the outstart to have an idea of the area you want to focus on. You can then preview that topic within this PAM and refer to it as required. Where are your training priorities?	Activity 1.1

Analysis of the Training Need

Job Analysis

Standard Work

Training Delivery

The Learning Environment

1.9 It is not always possible (or even desirable) to deliver training in a dedicated training room or other such environments that are easier for the trainer to control. A lot of workplace learning is carried out as **On-the-Job Training** (OJT), which puts certain pressures on the trainer *and* the learner. As a trainer you need to be able to deliver training using a range of methods such as: OJT; Job Instruction; Single Point Sessions; Work Instructions; Briefings; Presentations and workshops. You also need to be able to deliver training using a range of media such as: Simulation; e-learning; Hand-outs; Illustrations; Video etc.

1.10 The trainer-learner relationship relies a great deal on being able to communicate effectively and on being able to give **feedback**. Which, incidentally, ought to be **a two-way process**. The trainer needs to be able to pick up on **non-verbal** as well as **verbal cues** when assessing how well the learner is progressing. It is a common trap for trainers giving feedback to forget that feedback should also give the learner an opportunity to express things from their point of view. In this way the learner actually becomes a resource, a source of information for the trainer where potential improvements to the training can be identified.

1.11 This section provides you with a better understanding of the range of methods and media available, and how to use them during the process of **the transfer of skills and knowledge**. This transfer is dependent on preferred learning styles (and coping strategies).

How we learn

Learning Styles We each have our own preferences for how we teach *and* how we learn. It is important to have an appreciation of these preferences so that training benefits the learner and the company. For instance, we will have a particular preference for how we like to receive and process new information. Some will like to 'Just get on with it', others may prefer to 'Think about it first', some will want to know 'Where does this fit in at work?' and some will say 'Where's the detail?' By listening and watching carefully you will be able to identify the Activist, Reflector, Pragmatist and Theorist styles of learning, and adjust your training delivery accordingly. **Learning Styles** is covered in more detail elsewhere in this PAM.	Activist	Reflector
	Pragmatist	Theorist

The learning Space

1.12 Consideration of the learning space requires you to understand issues that might stop you from delivering the training required, to the necessary standard required. You need to be able to anticipate potential problems before they arise and prepare the learning space so the training you deliver is not affected.

1.13 Factors affecting training at work include:

1.14 **Time**. Time is key when delivering training. While a reasonable period of time can be set aside to teach a particular skill or job, the training time necessary is ultimately dictated by the learner. Furthermore, there may not be sufficient time available in the first instance due to other pressures and priorities requiring your attention.

1.15 Another time factor is the time needed to prepare for training. The actual training event is often the tip of the ice-berg. What goes unseen or is often over-looked is the time needed to prepare; and the administration required after the training event.

1.16 **Resources**. Even if sufficient time is secured there may not be enough space or equipment. Few places have a dedicated training venue and so On the Job Training (OJT) is the commonly used method of training. Again, this raises issues of priorities as managers juggle operational needs now against training needs of the future.

1.17 **Logistics and administration**. The logistics and administration required in support of training is not always appreciated. A single training event lasting just 15 minutes may require careful and detailed co-ordination of resources and people.

1.18 **Culture**. Companies have different attitudes to training and this cascades down to employees undergoing that training. A learning organisation (Senge P) prioritises staff development and successful companies integrate Continuing Professional Development (CPD) as key principle underpinning how the company operates.

1.19 **The desire to learn**. The learner may not have a strong desire to learn. Not everyone is motivated to want to learn new skills, or even necessary skills. Where there is a desire to learn there is still a process of learning where individuals go from low or no knowledge, to skilled and knowledgeable. For some, even motivated learners, this can be an uncomfortable process.

1.20 **Other priorities**. It may be that training is agreed but another priority overtakes the training need. Managers will always show greater attention towards operational needs. This is not to say they do not value training, it is a simple case of managing priorities. As the trainer you will need to liaise with managers on behalf of learners

Activity 1.2 Factors affecting the learning space

What potential issues are there at your workplace that might impact on the training you deliver? How can you overcome these barriers?	Activity 1.2

The learner-trainer relationship

1.21 A simplistic view of training would suggest that to say, 'Do this and do it this way' is sufficient training. There are times when this highly directing approach might be the most appropriate. For example, time might be pressing or safety might be about to be compromised. However, even these examples should be followed by a fuller explanation.

1.22 Another problem is that the person doing the telling is doomed to repeat the instruction as no or little learning has taken place. Furthermore, the member of staff carrying out the job has not been engaged at any level other than a very basic one. It is unlikely that potential issues will be anticipated or suggestions for improvements made by a person subjected to this kind of *training*. The person will 'Do that, and do it that way' and no more; and probably not very well.

1.23 Such an approach is inadequate when training people on even moderately complex jobs. There is no guidance on possible safety or hygiene issues, for instance. There are no hints or tips on what to avoid or how to do the job well. Furthermore, the simplistic approach is not in tune with a mature training approach, where there is greater emphasis on the quality of training and learner engagement. The quality of training and engagement is improved when the trainer focuses more on the learner and the process of learning.

1.24 A trainer has the responsibility of maintaining effective working relationships with learners. This involves varying the training so that interest is triggered and maintained.

1.25 A person learning something for the first time can anticipate making some errors until the new skill becomes familiar. An example of this is learning to drive. At work, an example would be learning to operate a piece of machinery. Maintaining a good relationship between the trainer and the learner is key to swift and successful passing over of skills and knowledge.
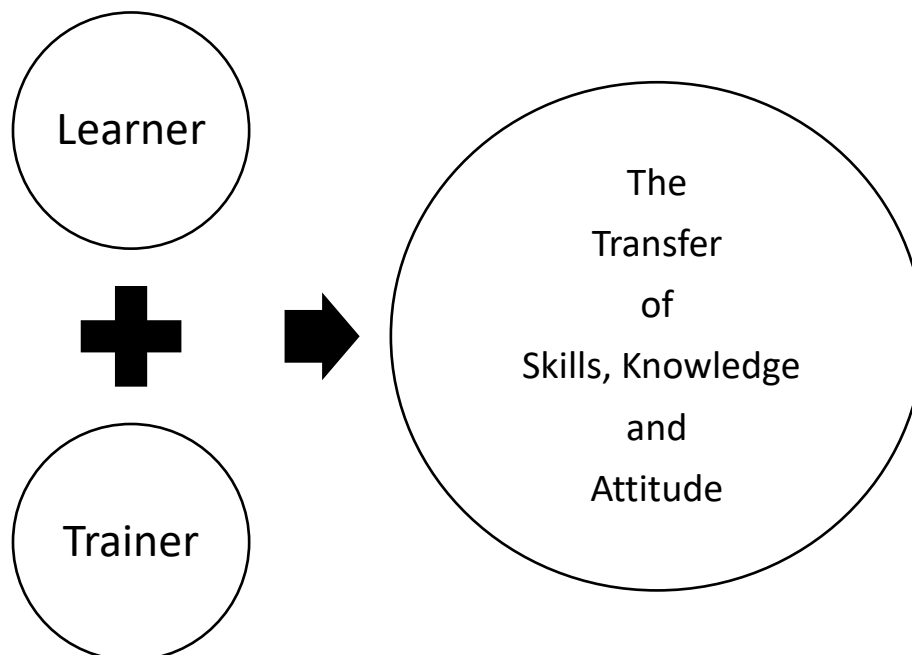
2 Learning Domains

2.1 There are three Learning Domains, these are the **Psycho-motive**, the **Cognitive** and the **Affective** (Bloom *et al*). Learning Domains are the areas that are stimulated during training. The Psycho-motive Domain is triggered by physical tasks and activities. The Cognitive Domain is stimulated by intellectual activities and exercises. The need for social interaction is sited in the Affective Domain. **The trainer should be aware of all three learning domains when deciding how to structure training**: Keeping learners active and getting them involved; challenging perceptions and stimulating the imagination; making learning fun.

2.2 Being involved in the design, delivery or evaluation of teaching, training, courses, learning and lesson plans, you will find Bloom's Taxonomy useful, as a template, framework or **simple checklist to ensure you are using the most appropriate type of training** or learning in order to develop the capabilities required or wanted.

2.3 Don't be put off by the language or the apparent complexity of Bloom's Taxonomy. It is a relatively simple and logical model. Taxonomy means 'a set of classification principles', or 'structure', and Domain simply

means 'category'. This example of the use of technical language provides a helpful lesson in

learning itself. Namely, if you want to get an idea across to people, you should try to use language that your audience will easily recognise and understand.

2.4 Bloom's Taxonomy underpins the **'Knowledge, Skills, Aptitude'** structure of learning. Bloom's Taxonomy of Learning Domains remains the most widely used system

of its kind in education particularly, and also industry and corporate training.

2.5 The learner should benefit from development of **knowledge and intellect** (Cognitive Domain); **attitude and beliefs** (Affective Domain); and the **ability to put skills into effect** (Psychomotor Domain).

2.6 The table below shows an 'at-a-glance' representation of the learning domains. The definitions are intended to be simple modern-day language to assist explanation and understanding. This overview can help you understand the taxonomy. Refer back to it when engaged in the design of training.

2.7 This table is followed by others with more detail

Cognitive	Affective	Psychomotor
Knowledge	Attitude	Skills
1. Recall data	1. Receive (awareness)	1. Imitation (copy)
2. Understand	2. Respond (react)	2. Manipulation (follow instructions)
3. Apply (use)	3. Value (understand and act)	3. Develop Precision
4. Analyse (structure/elements)	4. Organise personal value system	4. Articulation (combine, integrate related skills)
5. Synthesize (create/build)	5. Internalize value system (adopt behaviour)	5. Naturalization (automate, become expert)
6. Evaluate (assess, judge in relational terms)		

The Cognitive (Knowledge) Domain

Level	Descriptors	Examples of activity to be trained, or demonstration and evidence to be measured	Verbs. 'Key words' which describe the activity to be trained or measured
1	Knowledge Recall or recognise information	Multiple-choice test, recount facts or statistics, recall a process, rules, definitions; quote law or procedure	Arrange, define, describe, label, list, memorise, recognise, relate, reproduce, select, state
2	Comprehension Understand meaning, re-state data in one's own words, interpret, extrapolate, translate	Explain or interpret meaning from a given scenario or statement, suggest treatment, reaction or solution to given problem, create examples or metaphors	Explain, reiterate, reword, critique, classify, summarise, illustrate, translate, review, report, discuss, re-write, estimate, interpret, theorise, paraphrase, reference, example
3	Application Use or apply knowledge, put theory into practice, use knowledge in response to real circumstances	Put a theory into practical effect, demonstrate, solve a problem, manage an activity	Use, apply, discover, manage, execute, solve, produce, implement, construct, change, prepare, conduct, perform, react, respond, role-play
4	Analysis Interpret elements, organizational principles, structure, construction, internal relationships; quality, reliability of individual components	Identify constituent parts and functions of a process or concept, or de-construct a methodology or process, making qualitative assessment of elements, relationships, values and effects; measure requirements or needs	Analyse, break down, catalogue, compare, quantify, measure, test, examine, experiment, relate, graph, diagram, plot, extrapolate, value, divide
5	Synthesis (create/build) Develop new unique structures, systems, models, approaches, ideas; creative thinking, operations	Develop plans or procedures, design solutions, integrate methods, resources, ideas, parts; create teams or new approaches, write protocols or contingencies	Develop, plan, build, create, design, organise, revise, formulate, propose, establish, assemble, integrate, re-arrange, modify
6	Evaluation Assess effectiveness of whole concepts, in relation to values, outputs, efficacy, viability; critical thinking, strategic	Review strategic options or plans in terms of efficacy, return on investment or cost-effectiveness,	Review, justify, assess, present a case for, defend, report on, investigate, direct,

The Affective (Social) Domain

Level	Descriptors	Examples of activity to be trained, or demonstration and evidence to be measured	Verbs. 'Key words' which describe the activity to be trained or measured
1	Receive Open to experience, willing to hear	Listen to teacher or trainer, take interest in session or learning experience, take notes, turn up, make time for learning experience, participate passively	Ask, listen, focus, attend, take part, discuss, acknowledge, hear, be open to, retain, follow, concentrate, read, do, feel
2	Respond React and participate actively	Participate actively in group discussion, active participation in activity, interest in outcomes, enthusiasm for action, question and probe ideas, suggest interpretation	React, respond, seek clarification, interpret, clarify, provide other references and examples, contribute, question, present, cite, become animated or excited, help team, write, perform
3	Value Attach values and express personal opinions	Decide worth and relevance of ideas, experiences; accept or commit to particular stance or action	Argue, challenge, debate, refute, confront, justify, persuade, criticise
4	Conceptualize values Reconcile internal conflicts; develop value system	Qualify and quantify personal views, state personal position and reasons, state beliefs	Build, develop, formulate, defend, modify, relate, prioritise, reconcile, contrast, arrange, compare
5	Internalize or characterise values Adopt belief system	Self-reliant; behave consistently with personal value set	Act, display, influence, solve, practice

The Psychomotor (Motor Skills) Domain

Level	Descriptors	Examples of activity to be trained, or demonstration and evidence to be measured	Verbs. 'Key words' which describe the activity to be trained or measured
1	Imitation Copy action of another; observe and replicate	Watch teacher or trainer and repeat action, process or activity	Copy, follow, replicate, repeat, adhere
2	Manipulation Reproduce activity from instruction or memory	Carry out task from written or verbal instruction	Re-create, build, perform, execute, implement
3	Precision Execute skill reliably, independent of help	Perform a task or activity with expertise and to high quality without assistance or instruction; able to demonstrate an activity to other learners	Demonstrate, complete, show, perfect, calibrate, control,
4	Articulation Adapt and integrate expertise to satisfy a non-standard objective	Relate and combine associated activities to develop methods to meet varying, novel requirements	Construct, solve, combine, coordinate, integrate, adapt, develop, formulate, modify, master
5	Naturalisation Automated, unconscious mastery of activity and related skills at strategic level	Define aim, approach and strategy for use of activities to meet strategic need	Design, specify, manage, invent, project-manage

Charlotte

3 Learning Styles

3.1 A learner will have a preference for the way new information or skills are acquired. A Trainer's approach should be flexible enough to respond to the learner's preference. It is a rare event for trainers to be given the opportunity to ask learners to complete a questionnaire that would identify learning styles. Therefore, a key skill for a trainer to develop is to be able to recognise the learner's preference by watching and listening carefully, and adapt the training accordingly.

3.2 The starting point to adapting is to know where to adapt from. What follows is a brief description of the learning styles (Honey and Mumford).

Activist

3.3 An Activist will want to 'get on with it.' Anything other than the job in hand is a distraction. An Activist is quite happy to be thrown into the deep end and so there is less concern over the fear of failure. They will simply experience the event as a challenge, and try again. Being outward looking, the Activists' character is likely to be more extrovert and so they tend to make training a lively event. The motto of the Activist is, **'Let's do it.'**

3.4 Activists learn best when:

• involved in new experiences, problems and opportunities

• thrown in at the deep end

• working with others in problem solving, games, role-playing exercises

• able to lead a group

3.5 Activists learn least when:

• listening to lectures or reading long explanations

• reading, writing and thinking on their own

• analysing and interpreting lots of data

• following precise instructions

Reflector

3.6 These are the direct opposites of Activists. Reflectors learn more easily when given time to take in new information or to learn new skills. They will want to have a sense that they understand what they are doing. A Reflector is unlikely to be the first to volunteer to try the new skill being taught, and will hold back until they feel ready. However, once a Reflector is happy that they have been given sufficient time to filter and absorb the new information they will participate as fully as any other learner. The motto of the Reflector is, **'Let me think about it first.'**

3.7 Reflectors learn best when:

• able to stand back and observe first

• given time to think and investigate before commenting or acting

• given an opportunity to review what has happened

• doing tasks without tight deadlines

3.8 Reflectors learn least when:

• forced to take a lead in a group

• doing things without preparation

• rushed by deadlines

Theorist

3.9 Theorists enjoy learning experiences where lots of detail and facts are included. They are methodical learners who are able to take in chunks of complex information and make sense of it. What matters is that the detailed information is presented in a logical, ordered manner. Theorists are most likely to be unemotional learners, preferring to get absorbed into the technical aspects of a job being taught to them. The motto of the Theorist is, **'Give me the detail.'**

3.10 Theorists learn best when:

• an activity is backed up by ideas and concepts that form a model, system or theory

• in a structured situation with a clear purpose

• they have the chance to question and probe

• required to understand a complex situation

3.11 Theorists learn least:

• in situations that emphasise emotions and feelings

• when activities are unstructured or ambiguous

• when asked to act without knowing the principles or concepts involved

Pragmatist

3.12 Learners with a preference for understanding how the job is being taught fits in at the workplace are Pragmatists. They will remain attuned to the training if they sense that it relates to what they do. A Pragmatists will become frustrated with training that they see as having no relevance to the jobs they do. However, once convinced of the usefulness of the training they are receiving the Pragmatist becomes an enthusiastic learner. The motto of the Pragmatist is, **'Tell me what this has to do with my work.'**

3.13 Pragmatists learn best when:

• there is an obvious link between the topic and a current need

• they are shown techniques with clear practical advantages

• they can try things out with feedback from an expert

• they can copy an example, or emulate a role model

3.14 Pragmatists learn least when:

• there is no immediate practical benefit

• there are no clear guidelines on how to do it

• it appears to be 'all theory'

3.15 The descriptions above tell us about preferences learners will have. A learner will share characteristics from across the learning styles but is likely to have a stronger orientation towards a particular style over the others.

Matching activities to learning style

3.16 People show preferences for particular learning styles, and different learning activities are suited to different styles of learning. You are most likely to learn when your own learning style and the nature of the activity match. So, if you can choose among activities to learn the same subject, you may be able to choose an activity to match your preferred style. But often you aren't given the luxury of a choice, so you will need to use a style that may not come naturally.

3.17 If you are prepared to use different styles on occasion, so that you strengthen styles that you currently don't often use, you can become an all-round trainer / learner, able to benefit from any learning opportunity.

Learning Styles- Summary

Attribute	Characteristics	Preferences
Activist	Activists are those people who learn by doing. Activists need to get their hands dirty, to dive in with both feet first. Have an open-minded approach to learning, involving themselves fully and without bias in new experiences.	• brainstorming • problem solving • group discussion • puzzles • competitions • role-play
Pragmatist	These people need to be able to see how to put the learning into practice in the real world. Abstract concepts and games are of limited use unless they can see a way to put the ideas into action in their lives. Experimenters, trying out new ideas, theories and techniques to see if they work.	• time to think about how to apply learning in reality • case studies • problem solving • discussion
Reflector	These people learn by observing and thinking about what happened. They may avoid leaping in and prefer to watch from the side-lines. Prefer to stand back and view experiences from a number of different perspectives, collecting data and taking the time to work towards an appropriate conclusion.	• paired discussions • self-analysis questionnaires • personality questionnaires • time out • observing activities • feedback from others • coaching • interviews
Theorist	These learners like to understand the theory behind the actions. They need models, concepts and facts in order to engage in the learning process. Prefer to analyse and synthesise, drawing new information into a systematic and logical 'theory'.	• models • statistics • stories • quotes • background information • applying theories

Honey and Mumford

Learning Cycle

3.18 A slightly different perspective on learning also points to the importance of appealing to all the learning styles as learners move through the learning cycle. Kolb

or bias. During delivery of training a trainer is bound to come across the full range of learning styles, some more clearly identifiable in individuals than others.

3.19 Completing each stage is important not just for itself, but because it improves learning in the next stage. Honey and Mumford point out that there is an association between the learning cycle and learning styles. Therefore, if you have a strong preference for the Activist learning style, for example, you may be providing plenty of new experiences but failing to reflect and conclude from them.

3.23 A further thing to consider is the **type of learner**. Some learners will go out and seek training and are eager to be shown new skills. These are **Active** learners, who view training as something that is for them. Others will participate only when required to do so and would prefer to avoid training if possible. These are the **Passive** learners, who view training as something that is done to them. There is no value judgment to be made. It is just helpful for the trainer to have an appreciation of the type of learner being taught.

3.20 To become a more effective trainer / learner you should engage with each stage of the cycle, and that can mean using

activities and styles that you may not normally choose.

Learner preferences

3.21 Most people enjoy training where there is a balance between physical demands and intellectual challenge in a pleasant, social environment. When the balance is right learners come away from the training event feeling good and enthusiastic. Of course, training for some jobs will necessarily emphasise the practical and hands-on rather than intellectual aspects, and vice-versa.

3.22 While there may be extreme cases where learners show a strong preference towards a particular learning style, it is more likely there will be a mix of styles, but with that preference

3.24 To train other, and to learn effectively, there is a need to keep moving around this cycle:

The Learning Cycle Kolb

Concrete Experience
(Doing)

Reflective Observation
(Reviewing)

Abstract Conceptualisation
(Concluding)

Active Experimentation
(Rehersals)
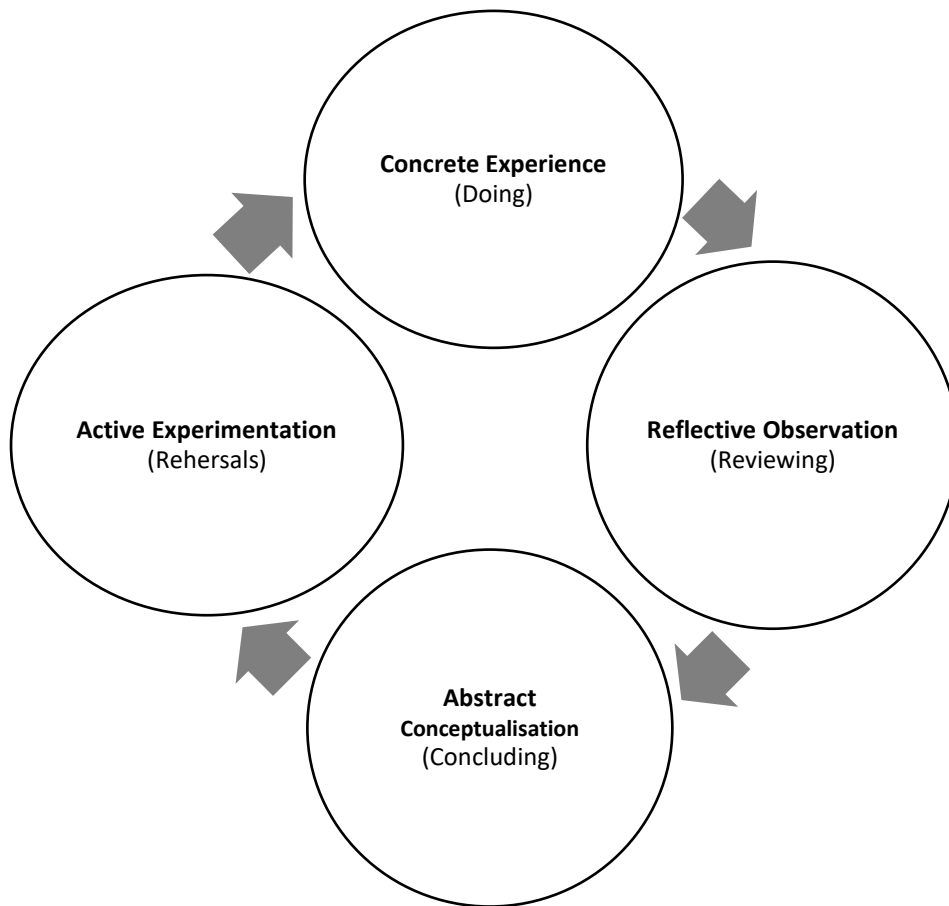
4 The Process of Learning

Achieving Competence

4.1 All learners follow a process of learning; all that differs is the speed at which they do. The process, or journey, can be unpleasant for some learners as it may take them out of their comfort zones. Others enjoy the challenge and readily accept the inevitable and temporary dip in their performance; confident that in time the new skill will be acquired. Another thing to consider is that managers and staff will go through the process repeatedly through their working careers. Changes, such as a new role, new equipment, procedures or legislation might result in re-training and the need to go through the process of learning.

Unconscious Incompetence (Ignorance)

4.2 '*Ignorance*' is better understood as **a lack of awareness of the training need**. The learner might not be aware that, for instance, new equipment has arrived and that it is now part of their work process. Some may even choose to remain deliberately ignorant. For instance, new equipment, legislation or ways of working involve change and some may respond negatively to change and attempt to avoid involvement.

Conscious incompetence

4.3 This early stage is when **the learner is moved outside of their comfort-zone and starts to learn the new skill**. The learner is aware of their lack of ability to do the job being taught and so may become frustrated at their own inability. While some learners are easily able to accept this phase of the learning process as temporary, others are not and require more support and encouragement.

Conscious Competence

4.4 At this stage of the process the learner is able to do the job to the standard required. However, **the learner has to concentrate on the specific tasks being done** at that time. Notes, or crib-sheets might be referred to, or advice sought from colleagues.

Unconscious Competence

4.5 This is the highest level of competence where the job has been learned and the learner is no longer a learner (and can potentially pass on the skills and knowledge to others). If you asked someone at this stage, 'How do you do that?' they are likely to struggle for an answer and eventually reply, 'I don't know, I just do it.' **The job has become so familiar they no longer have to *think* about what they are doing (or *how* they do it)**.

The Process of Learning

Unconscious Incompetence 'Ignorance'	Conscious Incompetence 'Resistance'
Unconscious Competence 'Work as Art'	Conscious Competence 'Testing and Adjusting'
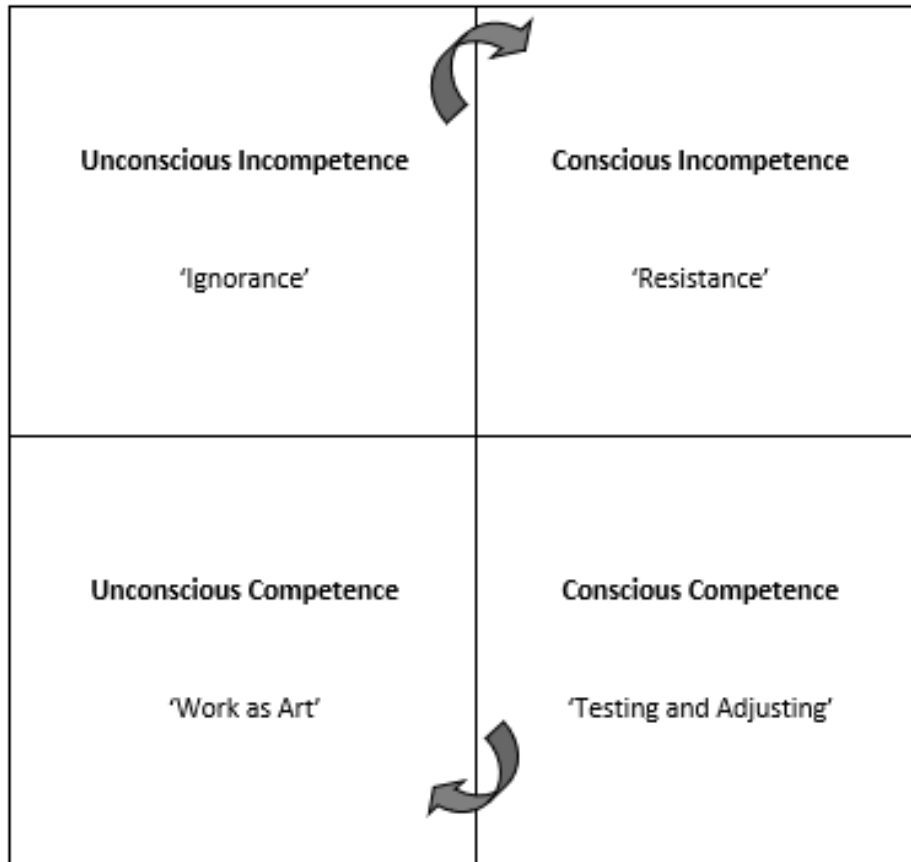
The role of the trainer in the process of learning

4.6 Your role as a trainer is **to deliver the training in such a way that the learner is moved to Conscious Competence as quickly as possible**. Trainers should adapt training to the needs of the learner. When guiding learners through the process, a trainer should be sensitive to the learner's desire to learn. Not everyone is keen.

4.7 **Distractions** can have an adverse effect on a learner going through the learning journey and so a trainer should be aware of these and avoid them. Ultimately, the trainer has to make a decision on the level of ability likely to be achieved given the circumstances and surroundings.

4.8 Memory is an indivisible part of the process of learning. **Short-term memory** is about what we need to know *right now*. It is short-lived and easily displaced. However, there may be times when an immediate instruction is required, rather than a deliberate training intervention (although an appropriate training intervention ought to follow). For example, where safety might be about to be compromised.

4.9 **Long-term memory** is like a super-efficient filing cabinet. Training is carried out in a structured way and 'makes sense' to the learner. Plenty of practice means 'recall' reinforces long term memory. Effective **On-the-Job Training (OJT)** and **Job Instruction Training (JIT)** are two effective approaches to training delivery targeted at the long-term memory.

Activity 4.1 Barriers to achieving competence

At what stage are the learners?	**Activity 4.1**
What are the barriers to their learning?	
How can you remove those barriers?	

The Vicious Circle

responsibility to help the learner out of this vicious circle.

4.10 The experience of learning can be a difficult time for some, sending them on a negative path. The following illustrates a Vicious Circle a learner could find themselves trapped in. As the trainer it is your

Sense of failure

Over-whelming criticism

Unable to complete the job

Lack of personal satisfaction

Motivation falls

Self-confidence falls

No attempt made to learn the job

'I'll never be able to do it'

Petty G

Activity 4.2 Plan to exit the Vicious Circle

What can you do to combat the vicious circle?	Activity 4.2

The Virtuous Circle

4.11 A trainer should take on the responsibility of creating the right learning environment for the learner. When you do this, you set the learner on a path that is most beneficial to everyone involved, including the company. The trainer, should seek to ensure your learner is on a virtuous circle.

Success

Training as a good experience

Reinforcement

Feedback

Self-praise, Approval

Motivated

Engaged

Desire to learn more

Self-belief

'I can do it'

High self-esteem
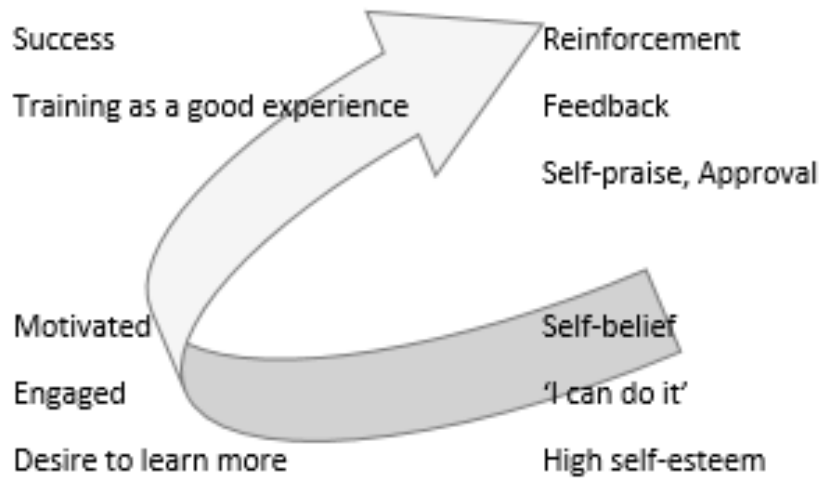
It is important to create the right environment for the learner. What actions within your control can you take to ensure the best environment for the learner?	Activity 4.3

5 Effective Communication

Verbal indicators

5.1 There is a lot to be learned by the way learners structure their answers or questions. If you can pick up on this (hidden) information you will learn more about the learner's emotional state and motivation, and as a consequence be more effective in the delivery of training.

5.2 Here are examples of indicators to learner preferences. They have been presented as what you might hear a learner say, and what it might indicate.

5.3 As a trainer you wouldn't react to just one indicator, but would 'calibrate' by noticing when the indicators are repeated over time.

Language, Indicators and Motivation		
Motivation	Indictor	Trainer Response
Proactive or Reactive	A person who is **proactive** will attempt to anticipate events and take the initiative to deal with them. Trainer hears, 'I noticed the product was taking too long to get here so I did this…' A **reactive** person will wait until events occur before acting. The reactive person may well have prepared but is more likely to act only when necessary. Trainer hears, 'I suppose if that happens, we could do this.'	Trainer responds, 'It's really good that you spotted that and did something about it. What needs to happen now is…' Trainer responds, 'Well, you're thinking about it and that's good…what needs to happen now is…

Language, Indicators and Motivation		
Motivation	Indictor	Trainer Response
Towards or Away	Some people are more goal orientated. They like knowing what is to be achieved and within what deadline. These people like moving **towards** personal targets. Trainer hears, 'Ok, I've got that. What's next?'	Trainer responds, 'The next thing for you to achieve as part of your training is…?
	Other people are motivated by moving **away** from discomfort. *Away from* people may also be motivated by goals and deadlines. However, this time it may be due to the fear of embarrassment or failure. Trainer hears, 'I don't want to fall behind…'	Trainer response, 'We'll make sure that doesn't happen…'

Language, Indicators and Motivation		
Motivation	Indictor	Trainer Response
Sameness or Difference	Learning a new job involves some change for the learner, and as in any change situation people react differently.	
	Some will seek out the **sameness** of the new job, how it relates to what was being done before. This gives the learner a sense of security and greater confidence before moving to the next phase of training.	
	Trainer hears, 'That was ok, it wasn't so different from…'	Trainer response, 'That's right, all we did was build on what we already know. You'll be familiar with this too…'
	Others will thrive on the **difference**. They will enjoy finding out all about the new skills. The more novel the better.	
	Trainer hears, 'That has totally changed how we do this. I can see how it will improve things…'	Trainer response, 'There have been a few changes to how things are done. Next we'll…'

Non-verbal indicators

5.4 There has been lots of research and discussion about non-verbal communication. As you go about the workplace you will be **constantly reading non-verbal signals**. It is an essential skill that enables you to operate effectively at work. You are able to make quick judgements on the emotions or moods of those around you. In training, you need to be able to read non-verbal cues from the learner. You also need to be aware of the non-verbal signals you are giving.

5.5 The most common **non-verbal** likely to have been listed are eye contact and arms being folded. In Western societies maintaining eye contact is seen as a positive, assertive thing. Whereas folding the arms is taken as a barrier being put in place. Care must be taken when trying to read non-verbal signals because there is considerable scope for error. The learner may *choose* not to maintain eye contact because in their culture it is considered aggressive or disrespectful. And somebody folding their arms may simply feel more comfortable with them folded.

5.6 **Rapport** can be a strong non-verbal cue. It is evident when a learner is engaged and interested. They will appear alert and focused, ready. As opposed to looking around or distracted, or texting. The learner will also pick up signals from you. Your own level of interest will be equally evident if you find yourself hurriedly mumbling instructions over your shoulder as you walk away to get on with some other task. Alternatively, the learner's response might be more positive due to your full attention being given during the training session.

5.7 Non-verbal indicators are of limited use on their own. They need to be observed in clusters to offer the trainer any real assistance.

5.8 The data below illustrates the accepted view that the greater part of communication is non-verbal body language. We learn from a young age to read the cues from those around us. Clearly, we communicate verbally but what may be surprising is that the tone of voice may convey more information than what is actually said. This can be illustrated quite simply with the following example: a child hearing his or her name being called by the parent will know instantly from the *tone of voice* whether pampering or robust feedback is about to occur.

Mehrabian

Communication

7%

38%

55%

■ Body ■ Tone ■ Words
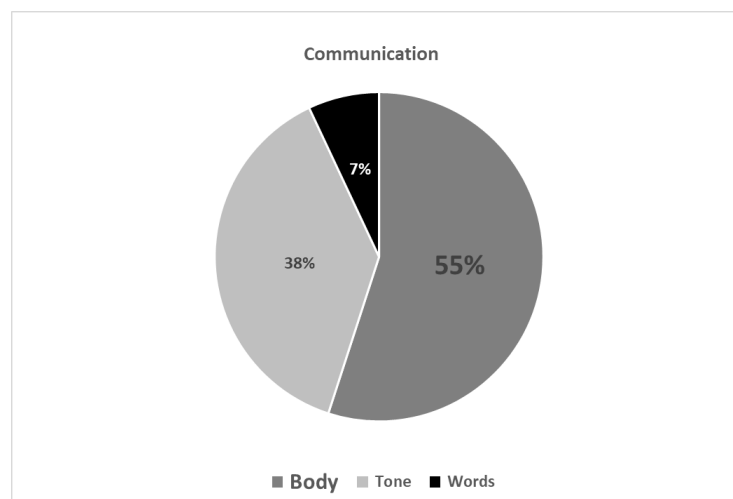
Activity 5.1 Recognising non-verbal cues

Make a list of the non-verbal cues you are aware of (in your learners). How can you improve communication with them?	33 **Activity 5.1**

Giving feedback

5.9 Feedback is something the trainer needs to be able to give to the learner. Trainers must also be able to accept feedback on their own performance.

5.10 Giving feedback is a deliberate and thought out process. There are many things for the trainer to consider such as the capacity of the learner to receive feedback, how much is appropriate, what to leave out.

5.11 While it is acceptable to give a general statement such as, '…that was good…' such statements should always be followed up by specific comments. The illustration below shows how feedback can be Positive and Constructive or General or more Specific.

5.12 When feedback has been destructive or considered to be nothing but platitudes it often becomes what the learner remembers as a bad experience, or even a personal attack. It can be a serious obstacle when trying to motivate the learner. This type of feedback says more about the trainer's ability and could be an indication of a training need there.

5.13 It is always better to highlight specific examples when giving feedback. This demonstrates to the learner that the task under review has been **properly observed**, and is not a personal and improvable criticism. A trainer giving feedback from notes taken during an observation is rarely in a '…Oh no I didn't…' …Oh yes you did….' scenario.

5.14 The trainer may have a long list of points that might justify being mentioned during feedback. However, some judgment needs to be exercised over how much feedback is enough. The learner will quickly become over-whelmed and demoralized by too much feedback. The feedback might have started off being specific but could easily turn general if too many points are raised**. The trainer needs to decide which few are the key points worth addressing now, and which can wait for another training event.** In any case, it is likely that by addressing a few key points the others are dealt with indirectly. Similarly, a long list of positives will quickly lose value. Especially if the learner thinks the job could have been better.

5.15 Observations that feedback is made from should be made against a **measurable backdrop.** This backdrop includes the **Performances** to be carried out, the **Conditions** under which they are done, and the **Standards** expected to be achieved while carrying out the Performances.

5.16 The feedback should be about the actions that were carried out (the observed action), measured against the actions that were required to be carried out (the Standard). **The trainer's task is to identify the gap, explain the gap to the learner and agree how that gap is going to be closed**.

5.17 A further thing to consider when giving feedback is to **focus only on what the learner can control.** This is very important when giving Constructive feedback because learners can only respond to things within their control. If their performance is adversely affected by something outside of their control, it is the trainer that has a new responsibility.

5.18 **Constructive and General** feedback is destructive to the learning experience. This kind of feedback leaves the learner unaware of what it is that has led to the general criticism. The learner will often (rightly) feel as though the comments are unjustified. The term 'Negative' feedback is often mistakenly used interchangeably with Constructive feedback. Negative feedback is an extreme form of *critical* feedback and is often a personal attack. Conversely, **Positive and General** feedback is unlikely to be valued by the learner as it will be viewed as false or insincere. However, as mentioned above, a general opening statement, either Constructive or Positive, is acceptable if followed by Specific feedback.

5.19 A trainer needs to be able to correct poorly executed tasks using **Constructive and Specific** feedback. The affect is the learner is more likely to accept the criticism as Constructive. Specific tasks or elements of the task are discussed, and ways to improve agreed. **Positive and Specific** feedback motivates the learner to want to do even better. Because it is specific the learner knows the positive comments are genuine. Constructive and Positive feedback, when specific shows that performances have been observed and measured fairly by the trainer.

	General	Specific
Positive	False, Insincere	Motivational
Constructive	Destructive	Constructive

-
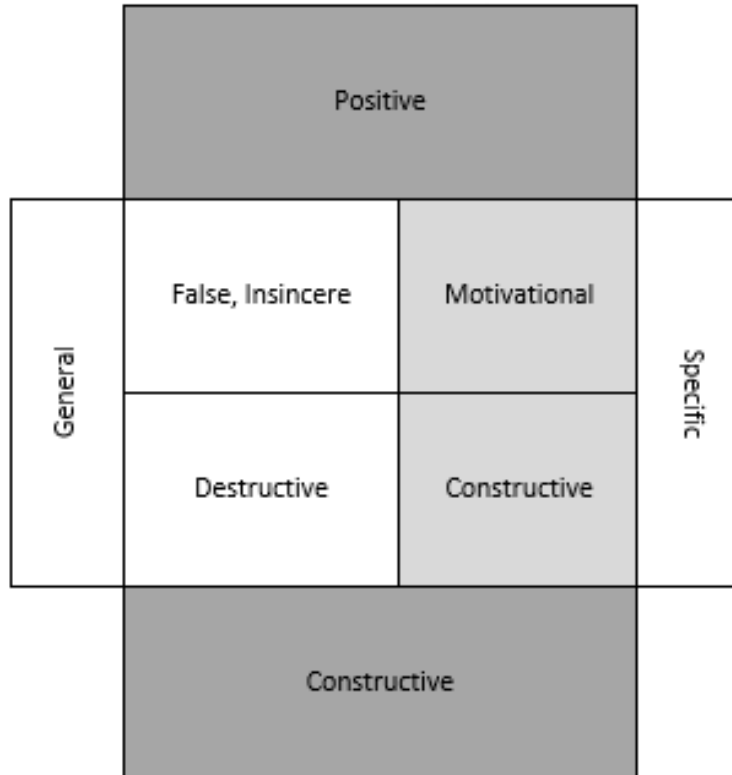
The Feedback Sandwich

5.20 You have probably heard of the Feedback Sandwich. This is a tried and tested method of **giving constructive feedback**, but starting and ending with feedback that is motivational:

5.21 Start with something 'Positive' and 'Specific'. Give the 'Constructive' and 'Specific' feedback. End with something 'Positive' and 'Specific'.

5.22 There may be more than one critical element but the feedback should always end on a positive note. Even where a task has been completely failed a good trainer should be able to offer encouragement.

Activity 5.2 Plan 'Feedback'

As a trainer it is possible to anticipate mistakes the learner is likely to make. How can you plan ahead so that your feedback is even more effective?	Activity 5.2
Performance 1 Feedback	
Performance 2 Feedback	
Performance 3 Feedback	

Rapport

5.23 Establishing rapport is an essential tool for the trainer. Rapport is the oil that allows information to be transferred more easily. Attempting to establish rapport does *not* mean giving in to the whims of the learner; the trainer still maintains a natural authority and is there to pass on skills, knowledge and a positive attitude to work.

5.24 The trainer-learner relationship should start from a **clear set of ground rules**. You have a particular responsibility as the trainer and should conduct yourself in a **professional manner**, applying the **methods of instruction** contained within the Instructional Specification (Lesson Plan or Work Instruction). You ought to be able to demonstrate **a genuine interest in the learner**, being able to understand **the learner's perspective** on events. A trainer should never use sarcasm or put-downs. Being **able to empathise** with how the learner is experiencing the training will help trainers get the pitch and pace of training, right.

5.25 There are a number of things that can make it harder for you to establish rapport. Perhaps the *level* of the job exceeds the learner's capacity to do it. In this kind of situation, the learner is likely to become increasingly overwhelmed withdrawn. Perhaps

the level is right but the *burden* is too great. Even simple jobs may have to be done slowly before the full load can be tackled by the learner.

5.26 Training is delivered at the workplace and so there are bound to be ***distractions,*** for the trainer as well as the learner. If the discourse between the trainer and the learner is constantly directly or indirectly interrupted it could lead to misunderstanding. Another distraction is *jargon*. People experienced at their work may often use jargon, which can baffle the learner when used in training.

5.27 Many workplaces have employees from across Europe and further afield. This results in people from different cultures working side-by-side, and different cultures may have different expectations. For some, English will not be their first language which may result in misinterpreting what is being said as *blunt* or *intentionally rude.*

5.28 While training is formal, the use of first names, smiling, facing the learner when addressing them, eye contact (but not the psychotic, non-blinking type of eye contact) all help to put the learner at ease and establish rapport.

Activity 5.3 Overcoming barriers to rapport

What barriers are there to rapport between the trainer and trainees? What can you do to overcome these barriers?	Activity 5.3

6 The Training Requirement

Identifying the training requirement

Business Functions

6.1 Identifying the training need starts with ensuring the Business Functions within the organisation are properly identified. This can be at the strategic level (Group), or the Operational level (the Site, or Departments within the site). Business Functions can be a short description of the purpose of activities, an explanation of what occurs and towards what aim. This description does not require a detailed presentation of Strategy, Policy, Procedures or of KPIs[1].

Roles

6.2 Once the Business Functions have been accurately stated, the Roles necessary to carry out those functions should be identified.

Proper identification of the required Roles is the basis of efficient operations, **having the right people at the right numbers in the right area of the business carrying out the right job with the right equipment at the right time and to the right Standard**. Roles can be illustrated using a Role Scalar[2]. A Role Scalar can be drawn at whatever level is required. For example, a top-level (strategic) Scalar would illustrate numbers etc required within the Group. The next level Scalar would illustrate the numbers required at the Site (or within the factory). The next level would then illustrate requirements within departments, and so on until the optimum and most practical level is reached.

6.3 The identification of the various Business Functions and Roles results in the establishment of the Training Requirement.

'Fast&Fresh Deliveries' Line Leaders Role

	Line Leader	
Each Production Location	Each Production Shift	x1 P/Line
Location F Location M Location C Location G	'A' Shift 'B' Shift	Location F x7 Lines Location M x10 Lines Location C x10 Lines Location G x10 Lines
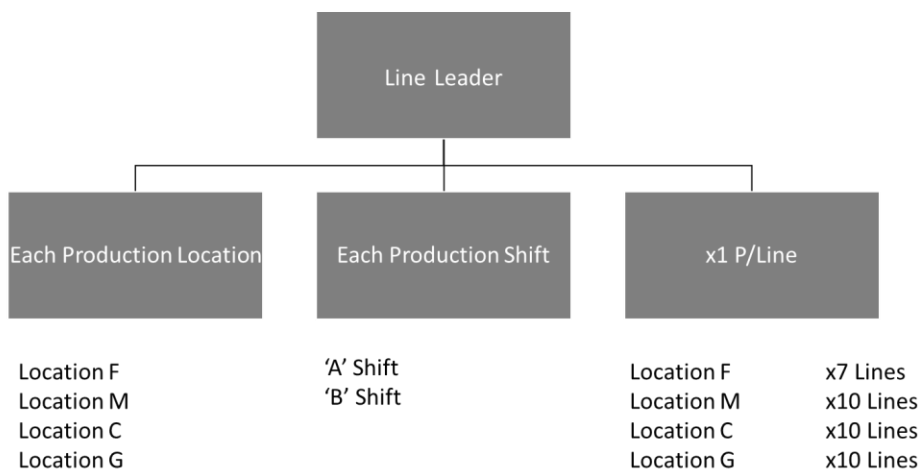
37 Lines x 2 Shifts x 4 Locations = 296 Line Leaders

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[1] KPIs. Key Performance Indicators.

[2] Scalar. Relational chart showing hierarchy and difficulty, (or complexity).

Triggers for training

6.4 In addition to the above identification of the training requirement, a need for training can be triggered by a range of events such as new equipment, changes to legislation or changes to procedures, for example. A more day-to-day trigger would be the arrival of new-starters, or the identification of the need to re-direct current practices that have deviated from the Standard. Sometimes a quick intervention such as a 'Tool-box Talk' will suffice, whereas at other times On-the-Job training is necessary.

6.5 Most companies will focus on individual training needs and provision. However, people rarely operate as a lone entity separated from all other activities. Therefore, wherever possible, training interventions ought to consider the wider collective context by consideration of the need to operate collectively within department, site, or Group environments.

Job Analysis

6.6 Each job (or task) should be illustrated using a Job Scalar to illustrate the different Performances of the job. Each Performance to be carried out should be further examined to provide detail on the Conditions under which the job is expected to be done, and the Standards to be achieved. This examination of the job results in the production Performance Statements.

Job Scalar

'Fast&Fresh Deliveries' Line Leader: Job Analysis

Role		**Line Leader**	

Duty	**Manage the Team**	**Run the Line**	**Review Work Done**

Tasks
(and Sub-tasks; not shown in this example))

Monitor:
T&A
Carry out:
Performance Reviews
Arrange:
OJT
PDP

Carry out:
Equipment checks
Product checks
Pre-start checks
Start-up checks
Product audits
End-of-Run checks

Monitor team performance (KPIs)
Carry out improvement activities
Liaise with other teams
Liaise with other departments
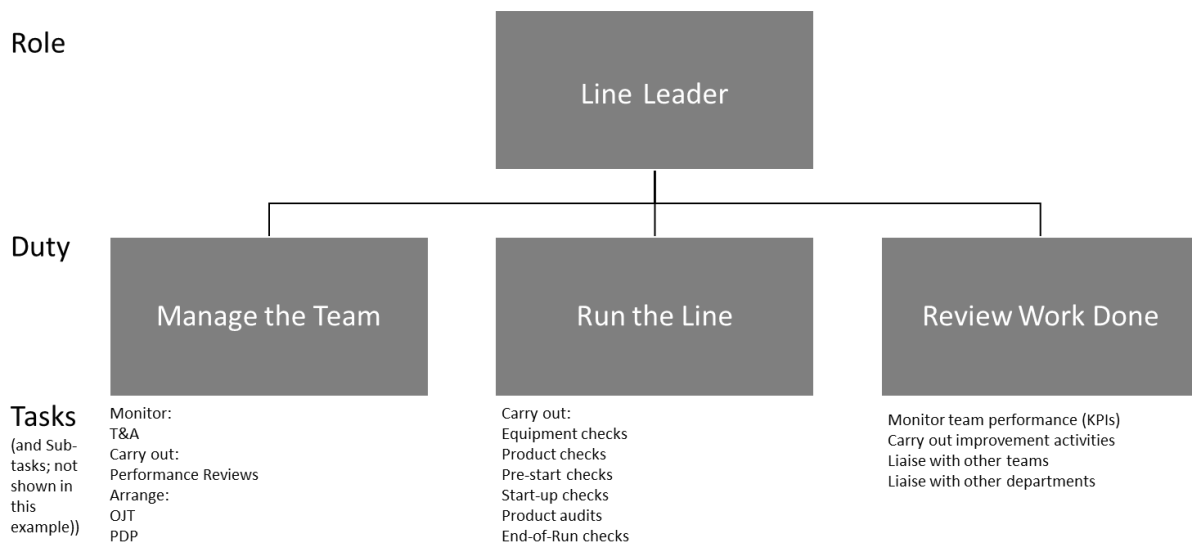
Workplace Performance Statements

'Fast&Fresh Deliveries'   40

Line Leader: Job Analysis- Workplace Performance Statements

Performance	Conditions	Standards
Manage the team	At all times while on duty	In accordance with company Policy and Procedures
Run the line	Within required temperature environments With a standard crew Given appropriate equipment	In accordance with: The production plans Customer requirements
Review work done	At and away from the line With own crew With other crews and personnel	

Note. The level of detail required will be dictated by the nature of the job. The detail here is illustrative, only.

Training Options Analysis

Skill, Knowledge and Attitude

6.7 Once the performances have been identified the next requirement is to pay attention to how to train people to carry out those activities. Here, it is necessary to **take each Performance and identify the Skills and Knowledge necessary, and the general Attitude the training wants to promote**.

6.8 **Skill** includes the physical element of the job, but also includes mental agility (or emotional intelligence). Therefore, in addition to physical skills, there are the mental skills that a learner can be taught that equips them with the ability to process information from a given situation and respond.

6.9 **Knowledge** includes the hard facts and figures involved. This element is about the interpretation of data and how to make various calculations.

6.10 **Attitude** is often overlooked when training options are under consideration. However, this element is essential in ensuring that training emphasises the desired behaviours at the workplace. Attitudes draws attention to how people think about their work, fell about the workplace environment and how they act within it.

6.11 Another way to appreciate this aspect is 'character'; how do we want the individual to express themselves when by themselves and when presented with circumstances that will require them to decide for themselves to act appropriately.

'Fast&Fresh Deliveries'

Line Leader: Job Analysis- Skill, Knowledge and Attitude

Skills	Knowledge	Attitude
Manual Handling- Equipment Plant Materials	Techniques Structure Tension Pressure	Demonstrate correct application Encourage others
IT- Information Systems Control Panel	Software applications- MS Office C-MIS	Attention to detail Process information
etc	etc	etc

Training Performance Statements

6.12 Similar Skills, Knowledge and Attitude elements are grouped together and thought given to how to best train these so that the learner is best equipped to carry out the Performances. The grouped elements become the Training Performance Statements and relate directly with the Workplace Training Performances identified previously.

Training Options

6.13 Training follows a continuous cycle of **Analysis, Design, Delivery and Evaluation**. Sometimes, the cycle is complicated and can be drawn out over a lengthy period. Other times it is a quick process. Most training at the workplace falls in between the two extremes.

6.14 Training should add value, be beneficial to the company as well as the trainee, so one of the first questions is, 'What are we trying to achieve?' The task for the trainer now is to identify what the job entails: what the **Performances** are, the **Conditions** under which the Performances are carried out, and the **Standards** to be achieved. These **Performance Statements** may exist in other documentation: in a Job Description, a Job Specification, or in other documents such a Procedures. In some cases the Performance Statement may not exist at all. In which case the trainer will have to identify it, or update the documentation mentioned above.

6.15 **Internal / External**. Companies will decide on two main options for training delivery, Internal (In-house), or External. There are

advantages and disadvantages to either and companies will consider these when arriving at a decision. Costs and expediency are two key factors.

6.16 There is considerable pressure (both self-induced and systems- induced) for companies to get employees to the required standard quickly and at minimum cost to the company. In extreme conditions this is where training shortcuts are often made, resulting in perceived short-term benefits but longer-term losses, (as mistakes can be anticipated because of inadequate training).

6.17 A company with a mature training framework will be able to deliver most of its own training effectively and efficiently, having invested in establishing a network of trainers throughout the company. This approach extends to management functions too, where 'mentoring' replaces On-the-Job- Training.

6.18 Where delivery cannot be met internally, companies will source external training providers. Often, this decision may be made for legislative or customer requirements. A company should maintain a list of preferred training providers. This contributes towards quality and helps speed up the process of choosing from options.

6.19 **Individual / Collective**. Another option to consider is whether the training is better suited to individual or collective delivery. Courses can be delivered to a group, for example when the topic is management development. Or individually, for example, e-learning. Similarly, On-the-Job Training can be a one-on-one event or to a group or team.

6.20 Whichever option is selected it is advisable to consider how the topic sits within the wider context, allowing a better appreciation of the whole operation.

7 Design of On-the-Job Training

Methods

7.1 Methods of training (how training is to be delivered) will be affected by such things as the training budget (costs), availability, suitability, trainer familiarity and the target audience (or learner profile). On-the-Job Training can take a range of forms and include:

Job Instruction Training

7.2 A structured, methodical *4-Step Approach* used to train routine jobs. It involves the trainer delivering training on a one-to-one basis using a *Job Breakdown Sheet* (JBS). The JBS is, in effect, the lesson plan and place emphasis on *Important Steps, Key Points, and Reasons*. Repetition during training, and follow-up as part of the training are also important characteristics. The Job Instructor Training course is available for trainers using this method.

Work Instruction

7.3 Work Instructions are normally presented as a list of actions to be carried sequentially, or a process flow. Work Instructions are best suited to tasks such data entry (list), or a process to be followed (flow). Work Instructions work by '*If this, Then this*'. For example: Check 'Power', Press 'F1', Enter 'Date', Press 'Return' etc. Another example is: 'Is the product within specification?' If 'Yes' continue, If 'No' inform a Technical Team Manager, etc.

Briefings

7.4 Often used. These are quick to set up and relatively easy to deliver. Briefings are a useful training approach to passing on *knowledge* requirements and may be written as well as oral. Briefings are commonly used at the start and end of work activities. One drawback for the trainer is that it could be difficult to check for understanding.

Single Point Lesson

7.5 This method focuses on a particular topic, providing a framework for the trainer so that all the salient points are covered. A Single Point Lesson can take many formats but is normally presented as a single sheet (A4 or A3) with notes, including where necessary diagrams, illustrations and pictures etc.

7.6 Examples where Single Point Lessons may be applied are: **Quality:** Defective incoming material or products; Causes and prevention of defects; Materials or product specifications; Methods for finding and discovering abnormalities in equipment and materials. **Inventory:** Materials inventory control specifications; Product inventory control specifications. **Equipment Operation:** Changeover operation; Start-up sequence; Monitoring and inspection methods; Shutdown; Cleaning and maintenance protocols. **Safety:** Emergency stopping methods; Safety standards for use of tools and equipment; Reliable methods to prevent accidents. **Maintenance:** Cleaning procedures; Adjustment procedures; Inspection procedures; Lubrication procedures. **Inspection:** Methods of inspection; Acceptance inspection specifications; Product inspection specifications. **Improvement tools:** Checklists; Cause-and-effect diagrams. In other words, whenever workers need key information to perform their jobs, Single Point Lessons can be an effective tool for delivering that information (Chartitnow).

Simulation

7.8 Simulation is an effective way of conducting OJT without using real resources or interrupting production. This method gives the trainer control over resources. Equipment can be allocated temporarily to the training session; or training aids can be produced. Also, the trainer is able to repeat the sessions as often as necessary. One danger of simulation is that it runs the risk of being too far removed from reality; what is being carried out during training bears little relation to what is carried out on the shop floor. Therefore, it is essential to ensure simulation is as close as possible to events.

Tool-box Talks

7.9 These are another type of workshop. This method is Procedure-based, and is used to communicate the desired message to staff. The trainer guides the learners through the contents of the document that informs the Tool-box Talk. This is often done away from the shop-floor, with opportunity provided for the learners to explore the topic.

Lesson Plan (Learning Specification)

7.10 Companies decide on the content and format of their lesson plans, similarly to the Single Point Lesson. The main difference is that lesson plans would normally be written for longer sessions whereas the Single Point Lesson is for sessions of a few minutes (commonly up to 15 minutes).

Evaluation

7.11 The Evaluation of training refers to quizzes or tests and can be Formative or Summative.

7.12 **Formative Evaluation** is carried out during training to help access progress and identify where learners may require further assistance.

7.13 **Summative Evaluation** is usually carried out at the end of the training programme. (Summative Evaluation is often colloquially referred to as *the end of course test)*.

7.14 Evaluation forms part of the **Validation** of training process.

Other Training Methods

Other training methods include:

Method	Disadvantages Including but not limited to:	Advantages Including but not limited to:
Presentation (PowerPoint, Prezi etc.)	Risk of excessive use of slides Requires careful consideration of content	Easy to update Hard copy can be produced in a range of formats e-Copy can be easily disseminated
Lecture	Little or no interaction or participation Academic rather than vocational	Can accommodate large audiences Complex information can be explained in depth
Coaching	Dependent on effective working relationships Time needed to reach required level of competencies vary between learners	High levels of competency can be achieved Training is targeted to specific needs Suitable for teams and one-on-one training
Mentoring	Mentoring framework requires support Mentors require training in the role Risk of creating conflicts of interests Risk of nepotism	Provides a support structure for leaners Is outside the reporting chain Effective method of passing on experience Effective method of passing on corporate knowledge Potential issues can be resolved before they escalate
Rehearsal	Use of resources (including time) Loss of operational effectiveness during rehearsals Risk of introducing complacency (e.g. fire drills)	Allows 'real time' practice (Experiential learning) Allows a test of resources (Including time) Highlights potential issues
Activities: Role-play	Dependent of active participation Quality of outcomes dependent on participants	Opportunity to practice Scenario-based activities can be related to real issues Removes fear of failure

Method	Disadvantages Including but not limited to:	Advantages Including but not limited to:
Discussion	Risk of loss of control by going off topic Risk of loss of control to dominant individual or group Requires skillful guidance by trainer Difficult to manage participation	Provides a framework for cross-fertilisation of ideas Ideas can be expressed and challenged Opens up opportunities
Distance Learning	High level of self-motivation necessary Difficult to share, explore the ideas of others Distribution and control of resources (Course materials) High level of tutor administration necessary Completed away from the workplace (Intrusion into private life)	Greater flexibility over scheduling The leaner has a high degree over the pace of delivery Topics can be repeated as necessary Leads to one-on-one coaching as necessary Completed within own environment
Self-Directed Study	High level of self-motivation necessary Difficult to share, explore the ideas of others Distribution and control of resources (course materials) High level of tutor administration necessary Completed during working hours (Loss of operational time)	Greater flexibility over scheduling The leaner has a high degree over the pace of delivery Topics can be repeated as necessary Leads to one-on-one coaching as necessary
e-Learning Web-based Learning	Reliant on availability of Information Technology and Communications (ITC) Reliant on (trainer and trainee) familiarity with ITC High degree of service availability necessary Can lack dynamism Psycho-motive domain not triggered	Easy to update Wide reach (Local through to global) A range of delivery options available: PC, Laptop, Mobile Results and analysis through a Leaner Management System (LMS) Stimulates the cognitive domain

Method	Disadvantages Including but not limited to:	Advantages Including but not limited to:
Vocational	Conscientious engagement necessary OJT at risk of 'lip service' being paid to training Use of resources (Equipment; Plant; Product) Effect on production until the trainee has reached the level of competency required	Primarily conducted at the workplace The learner develops within the team Topics can be related quickly and easily to operations May be part of a national framework (e.g. Apprenticeships)
Accredited	Training provider from outside the company Costs to the company	Training is structured around national standards Official recognition of achievement of the Outcomes Added incentive for the learner
Blended	Disadvantages are carried forward from the relevant method	Advantages are carried forward from the relevant method

Media

7.12 A wide range of media (audio/visual aids) is available to the trainer, including:

- A1 Flipchart with 'A' Frame
- Dry board
- Chalkboard
- Designated training stores/equipment
- Simulation stores/equipment
- Z-Frame
- Computer/Laptop
- Projector (and screen)
- Monitor
- Smart board
- Tele-conferencing
- Web-conferencing

7.13 As well as using a blended approach in relation to the selection of the method, trainers use a blended approach when selecting media. This helps stimulate creativity during the design of training. However, mixing media does require the trainer to give special attention to the logistics of delivery.

The selection of Method and Media

7.14 There are several factors that will influence the decision on the selection of method of training delivery and the type of media used. As mentioned, cost is one key factor. Companies naturally seek to keep costs to an absolute minimum, and training is an up-front cost with benefits that are often only realised sometime after the training event.

7.15 The availability of resources, including space and time, will also influence the decision. Resources, and the time required to prepare are often over-looked.

7.16 Trainers can expect to spend considerable time in preparation and carrying out rehearsals and this should be considered early in the design process.

8 Delivery of training

8.1 The actual delivery of training is the visible result of a considerable amount of preparation, administration, logistics and liaison between stakeholders. Even a relatively short event can take considerable effort to execute. This largely unseen aspect of training delivery should not be overlooked. While Analysis and Design is carried out away from the end result, it is a critical part of successful delivery.

8.2 The training occurs at the workplace, so trainers should consider all the factors that affect their ability to deliver the training, as well as learners' ability to benefit from the training.

8.3 The workplace should also have a culture of *continuous improvement.* Trainers are expected to contribute to the Development of training by identifying opportunities for improvement, and to make recommendations on how those improvements can be implemented.

Training Programmes and Schedules

8.4 A **training programme** is the schedule of works to be completed. A programme could be large or small, detailed, or illustrative. A small programme might consist of a single lesson plan, while a large programme might contain many lesson plans (and other methods).

8.5 A **training schedule** refers to the chronology of the training programmes, i.e. where it sits in the calendar. Care needs to be taken to allow sufficient time between programmes to allow:

- Re-structuring of course programmes and lessons
- Response to feedback
- Replenishment of resources (such as visual aids; hand-outs; training aids)
- Rest (to avoid 'Trainer fatigue')

8.6 **Trainer fatigue**. Delivery of training can be exhausting for those involved. Very few companies have dedicated trainers, instead trainers have their *day job* to do as well. If not properly supported there is a real danger that unfair and undesirable pressure could be placed onto trainers.

8.7 Continued, frustrating events may lead trainers to feel physically and emotionally exhausted. They may detach themselves emotionally as a means of distancing themselves from further pressure. Excessive pressure placed on trainers could result in a drop in their own performance, as well as inadequate training delivery.

8.8 Managers should be alert to this danger, pre-empt it happening and provide appropriate support by ensuring a conducive environment through the:

- maintenance of workplace discipline
- removal of unnecessary paperwork
- provision of administrative and logistical support
- provision of suitable time to rest
- removal of workload distraction

8.9 And anything else that might distract the trainer.

9 Validation of training

9.1 Validation is the means of obtaining information to measure the effectiveness of the training provided.

Internal Validation

9.2 Internal Validation is carried out **during or immediately after the training event**, usually in the form of a written, anonymous feedback questionnaire.

9.3 The purpose of Internal Validation is to **confirm the immediate effectiveness of the training**.

9.4 Trainers unconsciously receive feedback from learners; the trainer should be sensitive to the verbal and non-verbal communication they are receiving, and to adapt accordingly so that the transfer of skills and knowledge occurs.

9.5 Internal Validation of training is a more formal mechanism for obtaining feedback (by means of a questionnaire). Questionnaires are usually created at the Design of Training phase. Factors to consider include:

- the purpose of the questionnaire?
- should open or closed questions be used?
- should a scale be used (e.g. 1-5)?
- how will the questionnaire be rated, or scored?
- how will the results be distributed?

External Validation

9.6 External Validation is **carried out some time after the event (usually 6-9 months after)**. A written questionnaire is often used. However, anonymity is not a required characteristic.

9.7 The purpose of External Validation is to **confirm the validity of the training at the workplace**. External Validation helps ensure training remains relevant and targeted, (and unnecessary costs are not incurred). Factors to consider include:

- the direct impact has the training had at the workplace
- How often are the skills and knowledge acquired during the training used?
- How relevant the skills and knowledge remain?

10 Job Instruction Training

About JIT

This PAM section is abridged from Training Within Industry, a programme started by the U.S. government in 1940s to help the defence industry increase quality and productivity. TWI is comprised:

- Job Instruction
- Job Methods
- Job Relations
- Job Safety

Job Instruction adopts a methodical, prescriptive '4-Steps Approach' to training and is suited to manual, repetitive tasks.

The 4-Step Approach

Step 1
Prepare the Team Member

Step 2
Present the Operation

Step 3 Try out the Performance

Step 4
Follow-up
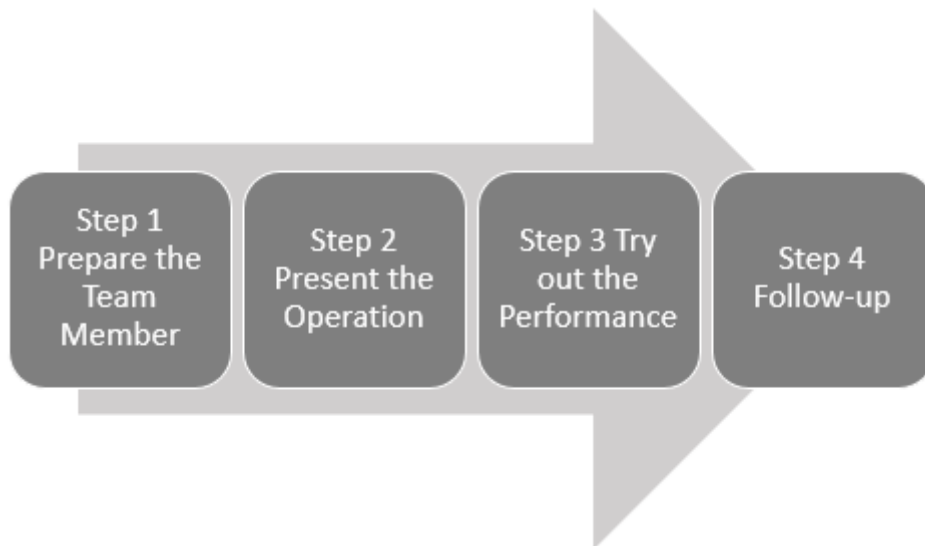
JI Trainer Guide

Session 1- Introduction to Job Instruction

After this session trainees will be able to:

1.1 Explain the importance of good instructional techniques

1.2 Explain how ineffective teaching adversely affects Production, Quality, Safety, and Costs

1.3 Describe the 4-Step approach to Job Instruction Training

Introduction to Job Instruction

Job Instruction grew out of a larger programme called **Training Within Industry, TWI**. This programme was started by the U.S. government in 1940, just before WWII, to help the defence industry increase quality and productivity.

Local industrial panels of volunteer consultants were formed to standardize techniques and training methods in order to maximize the potential of every worker. The ensuing results were tremendous and subsequently adopted by many companies around the world including the Toyota Motor Corporation. Even today Toyota considers JI and other TWI elements to be the fundamental building block of their training programme.

TWI originally consisted of three specialized programmes, called 'J' Programmes, with Job Safety coming later:

Job Instruction: A method for how to train new or experienced employees who must use new or improved technologies in their jobs.

Job Methods: Designed to help Team Managers develop a critical attitude toward their work and to make method-based improvements in the factory.

Job Relations: Training in how to promote teamwork and resolve basic worksite communications issues.

Job Safety: An approach to work that today would be recognised as Health and Safety.

The focus of this course is on Job Instruction. Many companies in production and manufacturing use Job Instruction to improve employee competence and to ensure that their productivity meets customer demands.

Problems in Production

Production

Quality

Cost Reduction

Other Problem Areas

Quality

Customers expect the highest possible quality, at the lowest possible cost and at the shortest lead time possible. If a company cannot provide that, someone else eventually will. It is the job of everyone to build quality into all products going to the customer in the most efficient manner possible. In return, the customer rewards the company with continued business and growth opportunities.

Production

Employees play a major role in the manufacturing of the company's final product. Trainers play a major part in training staff with the goal of the production of quality products. Good training ensures production proceeds smoothly within the various departments.

Cost Reduction

In day-to-day operations problems arise that prevents teams from achieving fundamental goals such as production scheduling, quality, and cost reduction. Every day the company faces factors that threaten to lower productivity, impair product quality and increase the cost of production. Factors such as product not being to specification, or waste.

Other Problem Areas

- The Product does not meet Specifications

- Inspection standards are not kept

- Too many rejects and rework

- Excessive wear on tools and equipment

- Frequent delays and interruptions.

- Safety equipment not effectively use

- Lack of interest in the work

- Employee inattention

- Too long before employee becomes fully capable

- Employees slow to learn

- Standardized work procedures not observed

- Poor observance of the Five Ss

- Consumable tools and other items wasted

- Injuries on the job

- Breakage of tools and equipment

- Absenteeism

Five Requirements of a trainer

Knowledge of Work

Knowledge of Responsibilities

Ability for Kaizen

Leadership Ability

Teaching Ability

Knowledge of Work

Knowledge of work refers to the specialized or technical information required to perform the work. For example, information on such items as materials, machines, tools, production steps, methods, and technical skills. Even if the same work is done every day, opportunities to learn something new still exist as nothing remains constant forever. New products are launched regularly, introducing something new or different.

Knowledge of Responsibilities

A trainer must understand the goals and objectives of the company and how they fit within the organization. Trainers must keep abreast of company policy, agreements, regulations, safety regulations and plans. These differ within the company and plants, so this knowledge must be acquired locally. To do their job well, trainers must also have a clear understanding of their responsibilities.

Ability for Kaizen

Trainers should constantly analyse the work of their department, looking for ways to combine, rearrange and simplify tasks to make better use of manpower, machines, materials, and methods at their disposal. This philosophy of continuous improvement is called 'Kaizen'.

Leadership Ability

Staff are the most important resource. Trainers must be able to work together with their colleagues to accomplish the goals of the department. Good leadership in training makes training events a key part in achieving those goals.

Teaching Ability

No matter how much knowledge or skills possessed, it is not possible to pass it on without teaching ability.

The Necessity for Training

There is always a great need for training in the company. Training is not restricted to new employees. Often, training involves members already within the team. Changes in operations, revised standards, new work to be done, and emergencies or accidents might require that staff learn new skills. Other examples include:

- When employees first arrive

- When employees come from other departments to help out

- When employees require additional training to boost their job skills

- When employees rotate between departments

- When human error leads to excessive defects and rework

- When there are accidents and injuries

- When a new product goes into production

- When new machinery and equipment is installed

- When there is a change of procedure or process

- When quality standards change

- When engineering changes are made

Ineffective Teaching Methods

Poor training can have serious results: lost production, lower quality, higher costs, and decreased safety. It can also prove damaging to personal relationships and the atmosphere of trust. Furthermore:

- New employees do not learn their jobs

- There will be many defects

- Re-work increases

- There may be more accidents and injuries

- Work would proceed erratically instead of in accordance with Standards

- Machinery and equipment frequently break down

- Production fails to achieve goals

- Skill levels do not rise

- Morale drops

- Motivation decreases

Experienced employees often need training just as much as new ones do. Failing to provide any training or providing insufficient training leads to problems. On the other hand, proper training can help reduce or even eliminate such problems.

In attempts to produce quality products in the most efficient way possible, one of the roles of a trainer is to provide team members with proper training. The ability to train others effectively is therefore one of the most important requirements.

This programme provides an opportunity for selected individuals to become better trainers. While there are many types of training, using a range of methods and media, this course is about:

Training using Job Instruction

The outcome of effective Job Instruction is that the employee can do a particular job:

•   Safely

•   Correctly

•   Conscientiously

Teaching safely, correctly, and conscientiously is the basic goal of Job Instruction. Following this method will not only make work easier in the long run, it will also help with reducing or even eliminating many of the problems of production.

Approaches to Training

Discussion. Most teaching methods fall into one of four approaches:

•   Telling is explaining verbally

•   Showing is the demonstration of the Job

•   Illustrating is explaining with written material

•   Question and Answer is asking a series of questions guiding the Team Member to the correct answer

Most common are Telling and Showing. Used together, they can prove quite effective. However, there are limits to their effectiveness when used alone.

Telling can make operations sound more complicated than they are. Few trainers can pick the exact words to describe the process. Secondly, there are certain actions that are exceedingly difficult to express in words. Finally, it is possible to tell too much for the person listening to be able to grasp at a single session.

'Telling' does not sufficiently add to real understanding? This kind of instruction is the real cause of many of the problems faced at the workplace.

Showing is another commonly used teaching method that is effective when used properly.

There are some limitations to this method:

One problem is the learner has a perspective on what is being shown and so may misinterpret an important part.

The learner might copy the trainer's actions perfectly yet copying is not the same as understanding. Many motions are tough to copy. The learner can easily miss the finer points because of not knowing what to look for.

Repetition can increase the success rate with either of these two methods, yet it still does not make them sure and reliable.

Illustrating is another method of showing. For purposes of instruction, 'illustrating' means charts, diagrams, blueprints, or sketches. Illustrating is a valuable tool that is used frequently around the site. One drawback is the individual being shown the illustration may not have technical knowledge; they may not be able to understand the point being made.

Question and Answer as an instructing tool is useful throughout the entire instructional process if it is used properly. It can be used in preparing the learner for instruction and checking the learner understanding of the material. It can also be used in helping the learner to think through the logical steps of the job.

Open questions should be used: why? Where? Why? When? Who? and how? This technique removes the option of the learner giving a 'Yes' or 'No' answer.

Noisy environments

Job instruction is not classroom instruction. JI normally entails teaching the employee at their place of work. Noise levels can be high enough to distract from demonstrations and explanations. Training has to be adapted to 'sight' over 'hearing': Gestures, illustrations, demonstration

Q. Amount taught per session.

A. More in a quiet area and less in a noisy environment.

Q. Number of repetitions?

A. More for a noisy environment.

Q. Pace (if adjustable)?

A. Slow it down.

The factory is not an ideal teaching environment. Move to a quieter location for discussion and practice.

One such case arises in Step 3, the employee lists the Important Steps, Key Points, and the Reasons for the Key Points. In certain circumstances there may be a need to divide the verbal explanation and the actual practice between quiet and noisy sites. However, the ideal is 'on-the-job' training. Ways must be devised to minimize this type of shifting between locations. Use of video, models, or simulations may help.

Applying Four Step Approach to long jobs

Factors and Methods:

- Team member capacity

- Natural divisions

- Time available

- Apply the 4-Steps

(Prepare, Present, Try-out, Follow-up)

Some Jobs are much longer and far more complicated than routine, production Jobs. Some jobs take hours, even days, to teach. There is so much material to cover that the employee cannot absorb it all at once. Even the trainer may have trouble remembering every detail of the whole operation.

How to apply Job Instruction

The whole operation should be separated into smaller jobs so that the employee can continue to work correctly, safely and conscientiously.

The 'Job'

Job Instructions combines all the aspects of telling, showing, and illustrating with questions and answers. The approach is simple and quick to learn. It is pure methodology. Following the 4 Step approach ensures the right information is passed across in the right way at the right pace and most effectively. the

Step 1 Prepare the Team Member

Step 2 Present the Operation

Step 3 Try out the Performance

Step 4 Follow-up

Step 1 Prepare the Team Member

- Put Team Member at ease.

Tension is a great barrier to learning. Ask questions that are not beyond their ability to answer. Create an atmosphere in which they can speak freely and spontaneously.

Getting the learner to relax will provide for a much more conducive environment for learning.

- State the Job.

By giving the job a name, you will relieve any uncertainty the learner may have about the Job.

- Find out what the Team Member already knows about the job.

You will be creating waste if the learner already knows the job. Take the time to find out what they really know before you begin instruction.

- Get Team Member interested in learning the Job.

- Telling the employee, the importance of the Job is one way to make them want to master it.

Step 2   Step 2 Present the Operation

Demonstrate the Job 3 times:

1 Tell, Show, Illustrate each Important Step

2 Repeat, stressing Key Points

3 Repeat, giving Reasons for the Key Points

- Instruct clearly, accurately, and patiently

This ensures the right information is given.

- Present no more than Team Member can master.

Too much information at one time is counter-productive and is a barrier to effective learning.

- Encourage Questions.

Asking questions allows the team member to develop the areas they are particularly interested in.

Step 3 Try out the Performance

- Have the Team Member do the Job and correct errors.

Instant feedback is always the most effective way to correct an employee and help speed their comprehension.

- Have Team Member do job while describing Important Steps.

This is to reinforce the steps as well as commit them to memory.

- Have Team Member do job while describing key Points.

This aids in the relationship of Important Steps to Key Points.

- Have Team Member do job while giving the Reasons for the Key Points.

The four checkpoints have now been passed: The Motions, The Important Steps, The key Points and the Reasons for each of the key points.

The Team Member may not acquire the new skill straight away. It may be necessary to patiently go over the Job a number of times until it can be carried out correctly.

The Basic Teaching Pattern   The Basic Training Pattern

Four Check-points of Job Instruction:

Step 2 Demonstrations x3

Step 3 'Try Out' x4

- Motions

  (Explanation, Demonstration,   Impersonation)

- Important Steps

- Key Points

- Reasons

Step 4 Follow-up

- Put Team Member on their own

Assigning the employee responsibility for the job builds confidence and decreases their dependence on the trainer.

- Designate where to go for help, and to who

Having someone other than the trainer to turn to for help relieves the anxiety caused by lack of confidence. Always introduce this person and make sure that they view them as approachable. If the employee asks the wrong person incorrect advice may lead to lost production and injuries.

- Check frequently

Follow-up checks are always necessary to prevent little mistakes from becoming permanent bad habits. Correct the mistakes and be generous with your praise.

- Encourage questions

A beginner finds it difficult to ask questions so they will try to find their own solutions. Do not leave the employee to their own devices. Let the person know that you are always open to questions and then keep your promise by answering such questions in a friendly manner.

- Give extra coaching where necessary and taper off the follow-up

Offer less help as the employee grows accustomed to their new skill. The goal is to make them fully independent as quickly as possible.

Giving Feedback

Feedback is the means by which comment on performance is given. Feedback should be given against performances that are:

      a. Observable

      b. Measurable

A Job Breakdown Sheets provides the reference for observing and measuring performance; through its 'Important Steps' 'Key Points' and Reasons Why'

A proven method of delivering critical feedback is to use a feedback 'sandwich': Positive; Critical Positive.

All feedback should be specific, otherwise if may be perceived as false or destructive.

Session 2- Job Breakdown Sheets

After this session trainees will be able to:

2.1 Describe the component parts of a job (as described within TWI)

2.2 Create a Job Breakdown Sheet

2.3 Describe the effectiveness of JBSs

Introduction to Job Analysis

Man

Machine

Materials

Method

Job Analysis

It is necessary to properly analyse Jobs before trying to teach them, otherwise important information may be missed.

Job Analysis must always be done at the shop-floor, observing the Job being done. Job Breakdown can be written properly only after watching a member of staff do the Job; often observing the Job being done a number of times in various conditions in order to take account of other factors.

A thorough Job Analysis must be carried out in order to identify correct methods used to complete the Job successfully, the materials and machinery or equipment required, and the motions, or kinaesthetic activities involved. Job Analysis can only be achieved successfully by direct observation of the Job being done under a range of conditions and by different people.

Analysing the Job-Definitions

Important Step

A logical segment that helps advance the job or adds value to the product

key Point

Anything that might:

Make or break the Job

Prevent injury to the worker

Make the work easier (e.g. technique or 'feel')

Reasons Why

Underlying purpose of the Key Point

Defining 'Important Steps'

What constitutes an Important Step? The usual definition is 'any logical segment of the operation that helps advance the job or adds value to the product.'

For example, 'Obtain pin or pick up screw driver' is not an Important Step as it is a motion or part of a larger set of motions that advances the Job.

What is important is 'Insert the pin into the designated recess'. It is not necessary to go into any greater detail. The point is that these Job Breakdown Sheets are not meant to be complete time motion studies. They are organizing tools for the trainer, not for handing over to the learner. Job Breakdown Sheets should be simple, common-sense reminders of all that we must cover when teaching the job. While it is important to be thorough, it is equally important to be concise.

Defining 'Key Points'

Types of key points: Important check or inspection, Health and Safety, Makes the Job Easier (i.e. Knack), Food Safety, Critical Control Point (CCP)

An important aspect of Key Points is to carry out a Hazard Analysis

Large parts of any new job are quite easy to learn since they represent new combinations of actions already familiar to the employee. Only some 5-10% could be called 'hard' or 'tricky' requiring exceptional effort to learn. As the name suggests, a Key Point gives the key to doing a particular Step properly. Key Points are:

Anything that might:

      Make or break the Job

      Prevent Injury to the worker

      Make the work easier (e.g. technique or 'feel')

It is not necessary to cover every precaution and everything that could conceivably go wrong. There is no need to go into excessive detail.

Knowing what the Key Points are and how to pick them out quickly and accurately are perhaps the most important parts to job instruction. Jobs involve a great variety of Key Points.

Defining 'Reasons Why'

Underlying purpose of the Key Point – To emphasise the importance of the Key Step and to re-enforce understanding.

Analyse the Job The group are to act as 'a collective trainer carrying out a Job Analysis'. Questions may be asked by individuals as the 'Job' is being carried out (by the course tutor).

Job Breakdown Sheets (JBS)

The Purpose of a Job Breakdown Sheet The purpose of a JBS is to help the trainer organize the job in their mind and determine the best way to impart this knowledge to the employee. In other words, once written it is a note from the trainer to the trainer.'

A Job Breakdown ensures:

•   Necessary information is collected

- Explanations and Demonstrations are structured

- Instruction is delivered in manageable chunks

- Important Steps, Key Points and Reasons Why are emphasised

The Job Breakdown Sheet does not have to cover every conceivable step, key point or motion. Neither need it serve as a complete instruction manual for the job, a manual that can be handed to the employee.

The Structure of a Job Breakdown Sheet

Nomenclature

The Job

Tools and Supplies

Common points or procedures

Health and Safety

 Steps that make the job easier

Food Safety

CCP

Important Steps

Key Points

Reasons

Training Aid

The language of a Job Breakdown Sheet is to be concise and should flow naturally when spoken. All the information required to write Job Breakdown Sheets to the required standard is contained within 'How to Write Job Breakdown Sheets-A Guide'

Preparing to Instruct

- Create a training time table

- Create a Job Breakdown Sheet

- Have everything ready

- Have the workplace properly arranged

A key part of preparation is for the trainer to be utterly familiar with the Job. To become familiar may require practice and so sufficient time should be given over to rehearsals where required. If trainers are not completely familiar with the Jobs they will not be able to teach it effectively. Poor teaching leads to unnecessary scrap, rework, and delays. It also contributes to a higher incidence of accidents, injuries, and worker dissatisfaction.

Job Instruction Planning Timetables **(JIPT)**
The timetables illustrate the level of training attained:

> Shown the Job

> Able to do the Job under supervision

> Able to do the Job without supervision

> Able to teach the Job

The 3 P's
Training is focused on People, with the aim of improving Performance and having a positive effect on Production

Careful consideration of these factors will identify factors that could have an affect (adverse or positive) on training.

People:

> Who is transferring?

> Who is new?

> Who needs cross training?

> Other?

Performance

What is the Standard?

Where are the poor performance areas?

What issues are there? (Such as time delays or Quality issues)

Production

Present production?

Planned production?

Production increases?

Process changes?

Seasonal factors?

Other factors affecting training

3 Main Elements:

Who to train?

Which Job?

By when?

Teaching the 'knack'

The second practical problem is teaching the 'knack'. Many jobs involve special knacks or 'tricks of the trade.' Since these are normally acquired only through long years of experience, they are very difficult to teach to someone else. trainers face the reality that complete mastery will require considerable practice over long periods of time. Yet, by pointing out the places where such special techniques are necessary and by trying to make the job easier for the employee, leaners can be given a head start on the road to mastery.

To an experienced person, tricks you have picked up over the years may seem like second nature. Yet they are not immediately obvious to the inexperienced. Teaching these tricks produces a very important benefit: the employee learns to do the job faster and requires less time to catch up to the pace of the others on the line.

However, it requires a great deal of teaching skill. Intangibles such as 'feel' and 'instinct' means that trainers must make doubly sure that the Team Member knows exactly what the expected result is. Such awareness can only be taught through repeated practice.

Techniques for teaching the 'Knack' of a Job: • Angles, Tensions, Pressures etc

Appendices

Appendix A Performance Statements (Example)

Performance: Complete PAM 2

Conditions

Given:	Without:	Other:
Access to training materials	During delivery of the training sessions:	During and outside of normal working hours
The necessary equipment		
	Advice or guidance from others	Within an agreed period
Sufficient time		
	Access to Standard Operating Procedures	
Sufficient space		
A learner or group of learners		

Standards

In accordance with:	Evidence of completion:	Other:
Company policies	Production of training support material	
Company procedures	Programming and Scheduling of training	
Training materials	Delivery of training	

Appendix B Single Point Lesson (Template)

Topic:			Duration:	SPL No ###	Notes:
Target Audience:					
Tools/Equipment:					
Safety:					
Health:					
Environment:					
Fire:					
Food Safety:					
Quality:					
Trainer Information:					
Key Learning Points:					

Illustrations/Photographs etc

Trainee Name	Date	Signature	Notes

Appendix C Lesson Plan (Template)

Topic:		Duration:	LP No.
Location:	Date:	Time:	

Outcomes and Learning Requirements:

Learner Profile:

Differentiation:

Formative Evaluation:

Summative Evaluation:

Internal Validation:

Audio/Visual Aids:

Safety:

Health:

Environment:

Fire:

Context:

Sub-topic:	Method:	Media:	Key Learning Points:
			79
Duration:			
Sub-topic:	Method:	Media:	Key Learning Points:
Duration:			
Sub-topic:	Method:	Media:	Key Learning Points:
Duration:			
Sub-topic:	Method:	Media:	Key Learning Points:
Duration:			

Additional information:

Appendix D Questionnaire (Template)

Title:				
1. How would you rate the training / course?				
Low 1	2	3	4	5 High
2. How likely are you to put into practice the training /course content?				
Low 1	2	3	4	5 High

3. What features did you like about the training/course? (Please tick all that apply)

Venue   Content   Pace of the delivery   Time to practice   Encouraged to ask
questions   Free from distractions   Relevance to my work   Reasonable breaks

4. How could the training/course be improved?

5. What other comments do you have:

Thank you for taking the time to complete this survey.

Appendix E Learning Styles Questionnaire

This questionnaire is designed to find out your preferred learning style(s). Over the years you have probably developed learning 'habits' which help you benefit more from some experiences than from others. Since you are probably unaware of this, this questionnaire will help you pinpoint your learning preferences.

There is no time limit to this questionnaire. It will probably take you 10-15 minutes. The accuracy of the results depends on how honest you can be. There are no right or wrong answers. If you agree more than you disagree with a statement, put a tick by it. If you disagree more than you agree, put a cross. Be sure to mark each item with either a tick or a cross.

Think about your workplace training and development when answering the questions:

1   I like to be absolutely correct about things.

2   I quite like taking risks.

3   I prefer to solve problems using a step-by-step approach rather than guessing.

4   I prefer simple, straightforward things rather than something complicated.

5   I often do things 'just because I feel like it' rather than thinking about it first.

6   I don't often take things for granted. I like to check things out for myself.

7   What matters most about what you learn is whether it works in practice.

8   I actively seek out new things to do

9   When I hear about a new idea, I immediately start working out how I can try it out.

10   I am quite keen on sticking to fixed routines, keeping to timetables etc.

11   I take great care in working things out. I don't like jumping to conclusions.

12   I like to make decisions very carefully and preferably after weighing up all the other possibilities first.

13   I don't like 'loose ends', I prefer to see things fit into some sort of pattern.

14   In discussions I like to get straight to the point.

15   I like the challenge of trying something new and different.

16   I prefer to think things through before coming to a conclusion.

17   I find it difficult to come up with wild ideas off the top of my head.

18   I prefer to have as many bits of information about a subject as possible, the more I have to sift through the better.

19   I prefer to jump in and do things as they come along rather than plan things out in advance.

20   I tend to judge other people's ideas on how they work in practice.

21   I don't think you can make a decision just because something feels right. You have to think about all the facts.

22   I am rather fussy about how I do things—a bit of a perfectionist.

23   In discussion I usually pitch in with lots of wild ideas.

24   In discussions I put forward ideas that I know will work.

25   I prefer to look at a problem from as many different angles as I can before starting on it.

26   Usually I talk more than I listen.

27   Quite often I can work out more practical ways of doing things.

28   I believe that careful logical thinking is the key to getting things done.

29   If I have to write a formal letter, I prefer to try out several rough workings before writing out the final version.

30   I like to consider all the alternatives before making up my mind.

31   I don't like wild ideas. They are not very practical.

32   It's best to look before you leap.

33   I usually do more listening than talking.

34   It doesn't matter how you do something, as long as it works.

35   I can't be bothered with rules and plans, they take all the fun out of things.

36   I'm usually the 'life and soul' of the party.

37   I do whatever I need to, to get the job done.

38   I like to find out how things work.

39   I like meetings or discussions to follow a proper pattern and to keep to a timetable.

40   I don't mind in the least if things get a bit out of hand.

Learning styles results

For each question you ticked above, put a 1 beside the question number in the columns below. Add up the 'I's in each column. For example, if you put a 1 next to three question numbers in the activist column, then your activist total is 3.

Next, transfer the results onto the relevant scale and join the points to arrive at your illustrated result.

Activist	Reflector	Theorist	Pragmatist
2	11	1	4
5	12	3	7
8	16	6	9
15	18	10	14
19	21	13	20
23	25	17	24
26	29	22	27
35	30	28	31
36	32	38	34
40	33	39	37
Total:	Total:	Total:	Total:
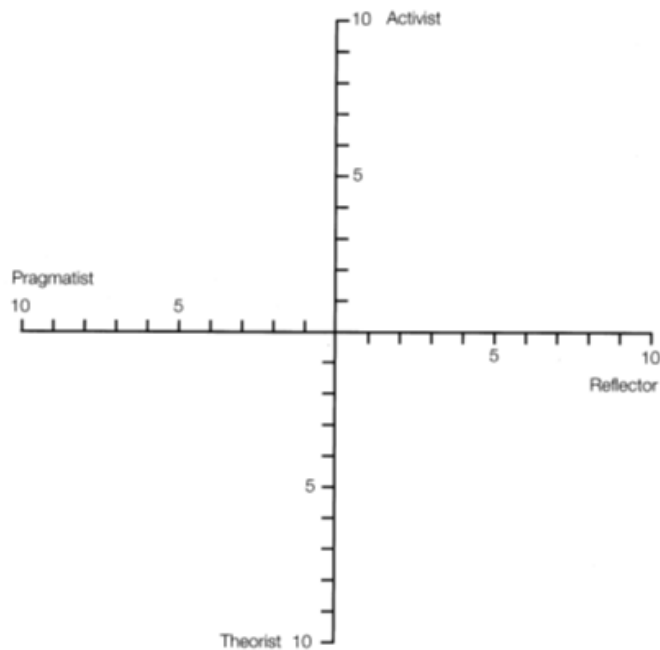
Appendix F JIT Preliminaries

|	
Session 1 hand-out	x1 each
Session 2 hand-out	x1 each
Session 1 Review	x1 each
Session 2 Review	x1 each
Job Instruction Card (4-Steps)	x1 each
Job Breakdown Sheet, Blank	x2 each
JI Planning Timetable, Blank	x1 each
'How to create Job Breakdown Sheets-A Guide'	x1 each
Practice. 'Sleeve Product'	Sufficient for x4 groups of 3 participants in each group (Trainer, Trainee, Observer)
Activity. 'Problems in Production?'	x4 boards, x4 packs of cards
Activity. 'Requirements of a trainer?'	x4 boards
Activity. 'Triggers for training?'	x4 boards
Activity. 'Approaches to Training'	X1 A3 Illustration each
Non-permanent marker pen	x4 (plus spare)
A1 Paper; A-Frame	
Course programme (Display)	x1
Attendance Register	x1

Appendix G The Fire Underwriters Knot

The Fire underwriters Knot is an approved knot that may be tied at the end of an electrical cord to prevent the wires from being pulled away from their connection to each other or to electrical terminals.

The origin of the fire insurance grading system dates back more than 100 years to a time when major fires destroyed large portions of cities in Canada and the United States. Historical fires such as the Great Fire of Portland (1866), Great Chicago Fire (1871), Great Toronto Fire (1904) and the 1906 San Francisco Earthquake and subsequent fire focused attention on the vulnerability of cities to the threat of conflagrations. During this era, water supplies, fire departments and fire codes were in their infancy and were simply not sufficient to prevent or control large, devastating fires. Insured fire losses were staggering and posed a serious threat to the financial stability of the insurance industry.

Faced with this enormous problem, the National Board of Fire Underwriters in the United States assembled an engineering team to carry out a detailed study of the fire conditions in major cities. In Canada, the **Canadian Fire Underwriters' Association** carried out similar work. Under that program, engineers evaluated the fire potential of many cities.
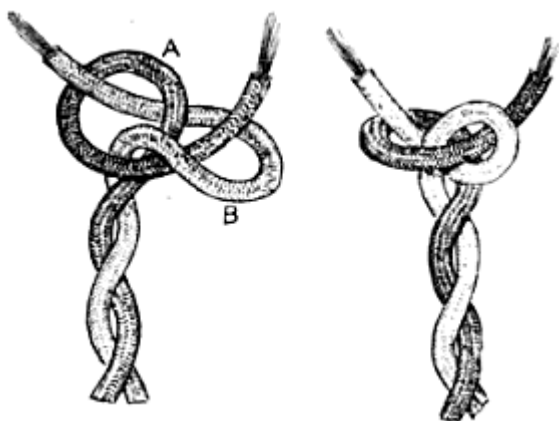
Appendix H Job Breakdown Sheet (Example)

Make a Fire Under-writers' Knot

IMPORTANT STEPS	KEY POINTS	REASONS
1. Untwist and straighten	1.1 6 inches	1.1.1 Quality standard
2. Make right hand loop	2.1 In front of main	2.1.1 In order to make strand correct tie
3. Make left hand loop	3.1 Pulled towards	3.1.1 Put a kink in wire to make it easier to move to next motion
	3.2 Under the stub	3.2.1 In order to make correct tie
	3.3 Behind main strand	3.3.1 In order to make correct tie
4. Put end through loop		
5. Pull taut	5.1 Ends even	5.1.1 Even tension in loops
	5.2 Knot snug	5.2.1 Correct positioning of knot

Appendix J Job Instruction Card

JI '4-Steps Approach'

Job Instruction Card	Job Instruction Card
Step 1 Prepare the Team Member Put the Team Member at ease State the job Find out what the Team Member already knows Get the Team Member interested in the Job	**Step 3 Try out the performance** 1 Have the Team Member do the Job 2 Repeat, explaining Important Steps 3 Repeat, stressing Key Points
Step 2 Present the operation Place the Team Member in the correct position Demonstrate the Job 3 times: 1 Tell, Show, Illustrate each Important Step 2 Repeat, stressing Key Points 3 Repeat, giving Reasons for	**Step 4 Follow up** Designate where to go for help, and to who

Glossary

Conditions*.* A term used to describe the workplace environment and resources available (or unavailable).

Continuous Improvement. A philosophy of development.

Cross-functional Team (CFT). An ad-hoc team formed to examine a particular issue with the purpose of identifying opportunities for improvement.

Differentiation. Reasonable adjustments to the learning environment that takes into account equal opportunities.

DMAIC. A Lean tool for structured problem solving: Define; Measure; Analyse; Improve; Control.

Evaluation. Assessment or testing. Formative […] is carried out during the training session or programme. Summative […] is carried out at the end of the session or programme. (See Validation).

Feedback. A term used to describe a review of performance. Normally based on 'observed and measured actual performances' compared against 'The Performances to be carried out, the Conditions under which the Performances are to be carried out, and the Standards to be achieved.

Goals. 'Targets' or 'objectives' that when combined achieve the 'Aim' or 'Vision'.

In accordance with (IAW). A training term used when about to refer to sources of information such as policies, procedures and technical manuals.

Learning Specification. The 'Lesson Plan' used in support of training. Produced in a wide range of formats.

Instructions. Succinct statements on what is to be carried out, containing a verb.

Job Breakdown Sheet. A document that contains the information necessary to teach using the Job Instruction approach.

Job Instruction (JI). A method of training originating from Training Within Industry that adopts a 4-Steps Approach to training.

Job Method (JM). Training Within Industry methodology concerned with improvements in business processes that adopts a 4-Steps Approach to making improvements.

Job Relations (JR). Training Within Industry methodology concerned with conflict resolution that adopts a 4-Steps Approach to conflict resolution.

Job Safety (JS). Training Within Industry methodology concerned with safety at the workplace that adopts a 4-Steps Approach to maintaining safety.

Key Learning Point. An essential part of the lesson; May contain an Outcome or Learning Requirement.

Key Performance Indicators (KPIs). Information/data that m trends in efficiencies and measures them against targets.

Leader Standard Work. Structured and co-ordinated management routines where time is allocated to specific activities; the result in identifying time that can be allocated to identifying opportunities for improvement.

Leadership. The personal qualities of an individual that inspires others.

Lean. ('tools' 'methods') Management techniques primarily concerned with eliminating waste and defects, and with continuous improvement.

Learning Requirements. The 'knowledge' that underpins Outcomes.

Management. The co-ordination and maintenance of resources.

Mission. A statement describing the current desired state.

On-the-Job Training (OJT). The process of acquiring skills and knowledge while performing the job.

Outcome. The end result; what the learner will be able to do by the end of the session.

Performance. A specific action or task to be carried out.

Policy. A statement of intent and principles; For example: 'The company puts safety at the centre of all its activities. The '10-Point Safety Code' is adopted throughout all departments at all our Sites, and at all levels.'

Policy Deployment. The cascading of company objectives throughout the company.

Procedure. A description of the operation; including instructions to be followed when executing company policy. E.g. Receive materials; Process ingredients; Pack the product; Dispatch the product. Procedures contain detailed information.

Programme, Training. The topics covered within the specified period. Also known as a Schedule of Works. (See Schedule).

Role. The position or function of an individual or team.

Schedule, Training. A calendar including a programme, or series of programmes.

SMARTER Objectives. Specific, Measurable, Achievable, Realistic, Time-bound, Ethical, Recorded.

Standard Operating Procedures (SOPs). A comprehensive document providing the information required to establish and maintain operations. Contents may include information on facilities, plant, staff, safety, maintenance and instructions etc.

Standard. A term used to describe the level of attainment required. E.g. In accordance with Work Instruction No. ##-####.

Strategy. A broad statement giving the nature of operations. E.g. Over the *next five years* the company will *grow through expansion into new markets*.

Structured Problem Solving. A Lean management technique that provides a framework for continuous improvement.

Training Within Industry. The 'J Programmes': Job Instruction (JI), Job Method (JM), Job Relations (JR), Job Safety (JS).

Validation. […of training…]. The means of obtaining information used to measure the effectiveness of the training provided. Internal […] is carried out during or immediately after the training event. External […] is carried out some time after the event (usually 6-9 months after). (See Evaluation).

Verification. The means of ensuring Standards are being maintained in accordance with the requirements of the awarding body when delivering accredited courses. Internal […] is carried out by the training provider. External […] is carried out by the awarding body.

Vision. A statement that describes the desired future state (See Mission).

Work Instructions. A step-by-step guide.

4-Step Approach to Training, The. Step 1 Prepare the Team Member; Step 2 Present the Operation; Step 3 Try out the Performance. Step 4 Follow up.

PAM 2 'Training'

Notes: