Creating Compelling and Effective Training

> *The difference between knowing it well enough for yourself and knowing it well enough to teach others is the same as picking a pear versus picking a prickly pear. –Erskin*

You want people to learn something–maybe a technical skill, maybe a factual history. Maybe someone needs help projecting confidence. Maybe you have hundreds of people that need to learn the new security system for the office building all before next Thursday. Regardless, you know something they don't, and you need to change that. You need to train people.

This guide will help you create initial training plans which you'll update as you learn what works and what doesn't. It will cover creating training plans, giving training, measuring training effectiveness, and making improvements based on feedback.

> ⊘ **The One and Only Gospel Truth**
> This guide is meant to help everyone, but especially absolute beginners. Communication is not a solved problem, and if it were it would still have more than one answer. Where the guide presents a definitive answer to such open-ended questions, know it does so only for the sake of brevity, clarity, and giving new folks a solid place to start.

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> ⊘ **TL;DR**
> 1. Don't be boring, be active and interactive
> 2. Know who is there, then tell them only what they need to know and why they care
> 3. Organize the information to make it easy to learn
> 4. Get feedback and use it

Structuring Training Plans

> *Really knowing something is not just about information, but how to organize that information. While you might want to know how to get rid of the prickles, you'd probably rather know not to pick a prickly pear wit h your bare hands first. –Erskin*

A training plan is the outline or script you follow to present a topic. It is not something you show to your audience. Instead, it is your notes on what you want to show and tell, and in what order. For this guide, I'm using structure to refer to the way you organize the information in your training plan. You'll start with a general structure for the types of information important for every topic. Then you'll choose a specific structure that best fits your topic for the main material.

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General Structure

No matter what the topic, there are some things every training plan needs to cover. Use this outline when creating a new training plan or to ensure your existing plans have all the basics covered.

Order	Step Mnemonic	Goal	Method	Example
1	What is this?	Identify the training by name so everyone can make sure they are in the right place.	Present the training title both visually and audibly when you start.	"This is the Prickly Pear Pie Preparation class. Let me just write that in ridiculously large letters on the whiteboard here."
2	Who am I?	Give folks a name to ask questions of and enough background to establish your knowledge of the topic. Establish the pattern for introductions.	Again, visually present or highlight details as you say them.	"Hello my name is Erskin. I'm the Head Baker on the night shift, which means if something goes wrong with anything that went into the overs after 4:00pm until closing, it's my fault. I've been at the Downtown Bar & Bakery for 4 years and know at least a little bit about our entire menu, and a lot about about baking in particular."
3	Who are you?	Learn who your audience is. Establish a pattern asking and answering questions. Make it easy to remember their names.	For smaller groups, write down everyone's name and department. Arrange them to match the seating arrangement next to your own name. Draw a rectangle to represent the table if it helps. For larger groups, at least write up a list of the departments or roles the audience represents.	–
4	Where are you?	Make sure the audience knows everything they need to before taking this training. Reinforce a pattern of asking and answering questions.	Rather than just list off requirements, state them as things that the audience should already know. Then ask questions which confirm this knowledge.	"You folks already know about baking fruit pies, right? What are four types of apples that would be good in a pie?"
5	What are we learning about?	Provide a basic definition and overview of the training topic so there is a context for the information to follow. That is, state the scope of the training. Reinforce a pattern of asking and answering questions.	This summary should dominate the visual presentation at this point. Don't be afraid to repeat or rephrase the description. Ask the audience directly if what you have said and written makes sense.	"Today we're going to talk about preparing prickly pears for pie. We'll cover procurement, preparation, and prolonged preservation in particular."

6		Why do you care?	Provide a per person (or per department/role) benefit, goal, or requirement that this training will cover.	Use the list you created from the "Who are you?" step to ensure you answer this question for everyone that is present and only those present.	"Rebecca, before you leave here today you and every other line cook should be able to prepare a peck of prickly pears for any of our styles of pie."
7		Show time	Present the topic.	See Topic Specific Structure below.	–
8		What did we learn about?	Review the basic definition and overview of the training topic to remind them of the context for the information presented. Ask the audience if they have gained this knowledge.	As you review the summary, relate it back to the more detailed material you just covered. Again, combine visual and verbal presentation.	"So that's it. We talked about prickly pear procurement–Pear Co. has the best, but take the longest to deliver and PearsByPost will do in a pinch. We talked about preparation–always wash twice; even for crunchy pies, always remove the prickles. And we talked about preservation–always pickle prickly pears in pairs, never refreeze a prickly pear. Does all that make sense to everyone? Did I miss anything?"
9		Why did you care?	Review the per person (or per department/role) benefit, goal, or requirement and ask the audience if they have achieved this.	Use the list you created from the "Who are you?" step to ensure you ask everyone, or at least every department or role, if they feel they have learned what they needed to meet their specific goals for this training. These are the goals you set for them in the "Why do you care?" step.	"Is there any line cook here who couldn't pickle ten prickly pears for me right now? Rebecca, you confident of this? Mike, if I said I needed a dozen pears for next week, could you order them?"
10		Who am I?	Reminder everyone how to get in touch with you if they have further questions, comments, complaints, or concerns.	Both verbally and visually present your name and department or role again prominently. This time also provide contact information such as email address, phone number, and where and when you can be reached in person.	–

| 11 | How did I do? | Specifically request feedback on the training. | Ask for feedback in person. Also, collect structured feedback through a survey immediately after the training while everyone still there and things are fresh in their minds. The survey should be short, easy, and allow for both structured and free-form feedback. Online surveys are great for this when the audience has laptops at the training. See Measuring Effectiveness below . | – |

Topic Specific Structure

Topics can be presented different ways. Which way works best for learning will depend on the topic itself. Let's say you wanted to teach someone about the features of forest. You could go through each feature one at a time from least to most interesting, starting with the trees and ending with the magical unicorn grotto. You could talk about the features as they developed over time, starting with the oldest tree in the forest as sapling, the lake that formed a few years ago and then dried up again, and finish with the pack of wolves which arrived only last winter. You might present the features in the order someone walking through would encounter them, from the sprigs of new growth at the edge, to the dark heart where no sunlight touches the forest floor. Each of these is a different structure for the same information. Choose the one that best suits your topic based on the guidelines and example structures below.

What Makes a Good Structure

The way you organize your presentation is the same way your audience will try organize the information in their minds. The best choice depends upon the topic itself, how the information will be recalled, and how well it supports the learning process.

1. Pick a structure that fits the information itself.
   a. For example, processes and historical events are naturally organized by time because earlier events influence later events.
   b. Positional arguments, by comparison, work well with a hierarchical structure where the main points are presented together and supporting information is for each point is presented together as part of the main point.
2. Pick a structure that supports the way the information will be used later.
   a. Again, a process is well suited to being organized chronologically because this is the same order people will perform the process in.
   b. When troubleshooting a complex system, separate parts of the system are checked separately for problems. Presenting information on each subsystem separately puts the keeps details that will be needed during actual use together.
3. Pick a structure that aids the learning process.
   a. A structure that matches how the information will be used later already helps by connecting the learning with actual practice.
   b. For more complex topics, it may be more important to organize the information to support learning even if it means going against the other two goals.
   c. If some information can be explained as a variant or more complicated version of other information, present the simpler information first. This allows repetition and taking on new information in small portions.
   d. Presenting information in an order where the one part allows you to deduce the next lets the audience be a part of the learning process. This type of inductive reasoning works well when part of the information you want to teach is the historical context.

Common Types of Structure

The number of ways to organize information is smaller than you might expect. All of these structures serve as tools to allow you to focus on one part of the whole topic at a time, instead of having to hold the whole topic in your mind at once. While you may occasionally find a better structure for your topic, start by considering one from this list of the most common structures.

1. Take a Tour: Location
   a. Organize information based on how things are arranged in the physical world
   b. This works well as a high level structure

   c. It can be for locations as broad as countries of the world, or as local the parts of your body
2. Just Sort It: Alphabetical
   a. Organize information based on the letters in their names
   b. This is structure of last resort, useful mostly for reference materials
   c. One of the most arbitrary structures, avoid it if at all possible
   d. It is especially weak as a high level structure
3. Watch the Clock: Time
   a. Organize the information by how it happened (or will happen) in time
   b. Often a great choice for historical information or "how to" process instructions
   c. It can work well as a high level or low level structure
4. Group it Up: Category
   a. Organize the information into groups based on similarities of the topic details themselves
   b. Topics of books in a library or the products in a grocery store are example of this structure
5. Rank and File: Hierarchy
   a. Organize the information based on its ordered relationships
   b. This structure is well suited to information which has relationships of importance or rank between various parts
   c. Company organizational charts is an example of this structure
6. Get to Specifics: Deductive
   a. Organize the information in stages from the most general overview or idea to specific details
   b. This works well when you have a common base idea and details which are variations on that idea
   c. It is generally effective, especially as a high level structure
   d. One example would be describing pears in general before talking about different varieties
   e. Another would be starting with a general problem and then breaking it down to main causes and then again to specific actions to address the problem
7. Draw a Conclusion: Inductive
   a. Organize the information in stages from specific details up to the general overview or idea
   b. This structure presents supporting information before presenting a conclusion. This can help overcome a natural bias to an unpleasant conclusion
8. Tell a Story: Narrative
   a. Organize the information based on how a person has or might interact with the topic
   b. Narrative structures provide a way to let the audience related to the information by relating to the protagonist of the story
   c. User stories are an example of this structure

> **Let's get meta**
>
> This guide also has a structure. Since it covers the process of creating and running training, it mostly follows a time based structure. That is, it covers the material in the same order that you would do the task it covers. It still starts with a title and the author and an overview of what it covers. But once it gets to the topic specific material, it starts where you would start if creating a new training plan.
>
> 1. Start with a general structure
> 2. Pick a topic specific structure
> 3. Create the training plan in that structure
> 4. Train people with the plan
> 5. Get feedback
> 6. Make the training better based on the feedback
>
> But wait! Right now the words you're reading are just after step 2 on that list, but the next section is about actually giving training. That's step 4 if you structure things strictly according to time, like the list above. The section on step 3 on creating the training plan doesn't show up until after this one. This is why I said this guide *mostly* follows a time based structure.
>
> Why talk about giving training before you create the training plan? This is a case of choosing a structure which supports learning the information, even if means not always following the time based structure that naturally fits the data and matches the way the information will be used. Knowing how to effectively present information will change how you create your training plans. Once you know that repetition and creating a dialogue with your audience make your presentations better, you'll want to directly incorporate them into your training plan. Because of that, this guide talks about giving training first, even though it is out of order in our time based structure.

Combining and Nesting Structures

Don't worry if you find certain structures overlap. Inductive structures, where you lead the audience to draw a conclusion from initially presented information, often combine naturally with the narrative structure by adding a protagonist who also reaches the conclusion. The step by step nature of time oriented structures can overlap with location based structures when they describe a process that takes place over multiple spots. These structures are less separate things and more different approaches to encourage you to think about your topic creatively.

You also can, and should, nest structures. Think of a company organizational chart. You might use location for the highest or outermost structure, that is, grouping people by each physical office. For each office in turn, you might use a hierarchical structure and organize people by departments and how they report to each other. You could then nest another structure and sort each specific department's personnel alphabetically. Remember that the purpose of structuring information is to group it into parts that are small enough to hold in your thoughts at once without being overwhelmed. Nesting structures lets you organize information at one level, but still save details for a lower level structure that better fits those details.

> ✅ **Let's get meta**
> While this guide mostly uses a time based structure at a high level. At a lower level, however, it uses different structures for the various lists of numbered items. The table in the general structure section is still time based. The points about what makes a good structure, however, are organized not only by time (how you are expected to consider the points when picking a structure) but also deductively. That is, the most complicated goal (the one which can override others, has the most supporting points, and is the most abstract) is saved for last.
>
> How is the list of common structures organized? (Hint: It's not, really. Is there a better way to organize it? What does better mean in this case?)

Next Up: Presenting Information

Presenting Information

> *Whether it's food for the body or food for the mind, it's not just what you serve, but how you serve it that counts.* –Erskin

Before you fill out the structure you've chosen, learn and remember these goals for actually performing training.

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> ⚠ **Warning: Real-time writing required**
> For a variety of reasons, this guide expects you to do more than narrate over a stock deck of slides. However you present material, ensure you have some way to add or edit things during your presentation.
>
> Whether it be writing down questions, noting people's names and departments, or creating diagrams, being able to respond dynamically to information from (or specific to) your audience is part of creating a dialogue with them. Anything less isn't a discussion, it's just you dictating–and that's boring.
>
> (And boring training is never effective or compelling.)

> ✅ **Oh my God, I can't even...**
> Are you scared to death of actually talking in front of other people? Are you worried that some of these things will make you look stupid in front of others? If you're having a hard time even getting started here, know that you aren't alone. Everybody starts nervous and it gets easier with practice. If you like, you can check out Toastmasters for more guidance.

Be Early

You are giving a live performance. This does not mean that things are more likely to go wrong than at other times. It just means you will regret it more when they do. Save yourself the regret. Do this instead:

1. *Show up 15 minutes early to your presentation space*
    a. Bonus: Double check that you are in the right place
2. *Setup everything you need to present*
    a. Bonus: This includes everything from your feedback surveys to the chairs and tables in the room
3. **Test everything you need to present**
4. When everything works anyway, remind yourself it's important to do this every time for that one time it *doesn't* just work

In short, problems during a presentation are *so* bad, it's worth the time and effort to proactively work against Murphy's Law. (The one that says: *"A nything that can go wrong will go wrong."*)

Be Entertaining

Presenting to others is asking them to give you their rarest, most precious possession–their time. And they can revoke this gift with no more effort than daydreaming. If you want someone's attention, you have to be worthy of it, and that means being entertaining. Congratulations, you're in show business.

This does not mean you treat your topic lightly. Do not confuse seriousness with solemnity. Instead, look for the enemy of entertaining: boring.

1. Set the stage before anyone arrives
    a. You remembered to Be Early, right?
    b. Having music playing to create a relaxed and happy atmosphere when people arrive
    c. For longer trainings, consider bringing snacks both for eating and to give people something to fidget with
    d. Draw or display something intriguing, even if you can't make it topic related
2. Be funny.
    a. I can't tell you how to do this
    b. No one can tell you how to do this
    c. This is the least useful thing in this whole guide
    d. I mean, if you already know how to be funny, you're probably already doing it, so this is really just reminding everyone who *can't* be funny that they *aren't* funny
    e. That not just useless, it's hurtful!
    f. Why are you even still reading these? Are you a an unfunny masochist? A funny sadist? Just go on to the next major item already!
    g. I should really delete this whole sub-list
    h. That said, if you *can* be funny, it *does* help
3. Show them something new
    a. Reference or relate your topic to popular events and current culture where you can
    b. Include something new and curious even if you can't make it relate to your topic directly
        i. You want to establish and maintain a sense of discovery and wonder
        ii. Having something completely different can help you Be Engaging if your audience has started to drift away
        iii. Creating your own interruption gives you a chance to Be Repetitive once it is over
4. Be a good host by taking care of your "guests"
    a. Welcome people as they arrive
    b. When you work to Be Interactive, do so with *everyone*, individually whenever possible
        i. *When it's time to ask a question, who have you not asked yet?*
    c. Be Repetitive not only on your topic, but on checking how everyone is doing, individually whenever possible
        i. This is how you know if your off-topic, self-induced distraction would derail everyone's attention, or is desperately needed
    d. Thank them for coming before they leave

Be Engaging

You need to be excited about your topic. You need to be so excited it shows. You need to be so excited it is infectious. If you don't think the information you are presenting is amazing, then why should your audience? If they don't think it's amazing, then why should they waste their time on it?

This needs to be continuous, not just when the presentation starts. The last thing you share should be as wondrous as the first.

1. You have discovered the next best thing ever and are excitedly sharing it with your best friends. Act like it
   a. If this sounds too ridiculous for your topic and audience, make sure you really have the right topic and the right audience
2. Acknowledge and then dismiss distractions
   a. For example, if you are interrupted by a car backfiring loudly: Stop, say "That was really loud. Someone should get their car checked. Now then, where were we?", and then continue
   b. You want to remove the nagging question in people's minds of "What do I do about that?" the distraction causes
   c. So you answer the question for everyone so it can be set aside and you can get back to the topic at hand
   d. Be Repetitive. Repeat what you just covered before the distraction
      i. It's an easy way to naturally repeat information without being boring
      ii. It refocuses everyone while giving them a reminder of where you were in the topic
3. Use information and patterns people already know for supporting information in examples
   a. This creates a sense of hidden secrets as people discover the patterns
   b. It also provides mental shortcuts for processing the supporting information
   c. If you need a random name, use the name of one of your audience and suddenly it's instantly familiar and relevant
   d. If you need a random number, use a number your audience already knows, for example 867-5309
      i. Yes, this won't work if the information isn't relevant to your audience
      ii. Knowing your audience is how you will Be Empathetic
4. Engage multiple senses
   a. Until we get much more powerful Scentography technology, this is probably limited to images and sound
   b. That said, if your topic allows for physical touch or activity, do it!
   c. Photos and videos are wonderful
   d. Screenshots are great *as a backup*
      i. As much as possible, your audience should be seeing (or better yet using!) the real thing live
   e. **Never show slides of text to explain a concept. Write, draw, and/or diagram what you are saying as you say it**

> ✅ **Chalk Talk? Chalk and Talk? Just Draw Something!**
> If you take away only one thing from this guide, make it this last point. The physical motion of writing and drawing is engaging. Plus you get the interactivity of incorporating your audience's questions and comments immediately and on equal footing with your own points. Combined you have a technique so powerful that all those slide decks full of bullet points are so bad they should be illegal.
>
> Can't draw? Who cares. You can write the words you'd put after those bullet points. (Or, draw anyway. It can be your way of being funny.)
>
> Too many words to write? Surprise, this means you had too many words to begin with.
>
> Can't spell? You can get close enough, and your audience will forgive spelling mistakes done live a lot easier than ones in a slide show. (Also, you can fix them as you go!)
>
> **Write, draw, and/or diagram what you are saying as you say it. Do it.**

Be Empathetic

You must constantly check not only that your audience is understanding you, but that you understand where they are coming from. It will be difficult, but you must strive to remember what it was like before you knew the topic you are sharing with others. *Regularly and repeatedly ask yourself:*

1. What does my audience know?
   a. About this topic?
   b. About related topics?
   c. About popular culture?
   d. About unpopular culture?
2. What does my audience not know?
   a. What do I need to make sure I explain?
   b. What can I use as a source of new exciting things?
3. Did I just say *any* word they have never heard before?
   a. If so, ask them what it means and/or define it for them
4. Did I just say any word they never heard *before I said it today?*
   a. If so, ask them what it means and/or redefine it for them so you can Be Repetitive
5. If you don't know the answers to any of these questions, *ask your audience!*

Be Believable

Take the time to establish that you know where your audience is coming from and about the topic at hand.

1. Talk to everyone about what they know or have worked on
    a. Use the time you got from being early and any time from others being late
2. Where overlaps occur, talk about your experiences knowing or working on the same thing
    a. If you have to, settle for similar things
    b. This is another spot where you can Be Entertaining (read: funny if possible)
3. Yes, you will do the same thing as part of the main topic structure
    a. This is another way to be both Empathetic and Repetitive
    b. It's also a way help people be comfortable talking to back you, which is to say, how you can Be Interactive

Be Interactive

Training should be a dialogue between your and your audience.

1. *For every three sentences you tell your audience, ask them something*
    a. You already have everyone's names where you can see them. Use them
    b. Ask someone in particular
    c. Ask someone you haven't heard from recently
2. Instead of stating something, ask about it instead
    a. Start with broad questions and get more specific as needed
    b. Does someone already know this?
        i. "Can anyone tell me how to de-prickle a prickly pear?"
    c. Can someone take a guess at a more general idea?
        i. "Here's a pear de-prickler I brought with me. Can anyone guess how it might work?"
    d. If your questions fail, ask simpler questions until you get people talking
        i. "Okay, there's a flaming nozzle end and a rounded rubber end. Which one should I grab this thing by?"
        ii. *(And yes, you really do de-prickle prickly pears with fire)*
    e. *It's fine if people need time to think through a question, you just want to **get them to think out loud***
3. Instead of drawing out a diagram or a long list of information, use guesses and questions to fill in your diagram or list
    a. Imagine you are hosting the television game show "Family Feud" for long lists–*Survey SAYS!*
    b. For diagrams, ask leading questions based on function
        i. "If we were going to invent an automatic pear preparer, what parts would we need? Here, I'll draw a bucket of pears to start with on this side and a pile of pummeled pears on this other end."
        ii. "Right! Something to mash the pears! We'd probably put that at the end."
        iii. "A peeler, that's great! I'll draw a box to represent that over here near the pear bucket."
4. Drag other people into questions
    a. If someone has a hard time with a question, ask someone else a question whose answer is a hint for the original question
    b. Or open the original question to everyone, then come back to the first person with a follow up question
    c. Avoid waiting for someone to fight with an answer that everyone else knows
        i. They feel dumb and everyone else is just bored
5. Encourage questions in general
    a. Regularly remind people that they can and should interrupt to ask questions
    b. Thank them every time they ask a question
    c. Regularly stop and ask if anyone has any questions
        i. Be specific and practical. Instead of "Any questions?" ask specifically about what you just covered "Does everyone think can use a de-prickler now?"
6. *If nothing else, ask people what you literally just told them*
    a. That is to say–*review as you go*
    b. This is a way to Be Interactive and Be Repetitive at the same time
    c. *All* of these way to Be Interactive are also ways to Be Engaging
    d. If people get used to speaking out to answer easy questions, they can focus on the hard questions without worrying about feeling awkward while speaking out

> ⚠ **But this will take SO LONG!**
> Yes, talking *with people* takes longer than talking *at people*. The difference is that talking with people will help them learn more than just talking at them. So while you should plan to spend more time on a topic than if you just rattled off the details, it's time well spent.

Be Repetitive

Repetition is the only method of learning proven to work for everyone. It's also a key tool in helping people focus on new information instead of churning on similar information they already know.

> ⚠ **But what about being exciting? Repetition is boring!**
> *Exact* repetition is boring. The value of repetition is when you say the same thing a different way, or say a different thing the same way.

Say the same thing a different way

Forcing yourself to explain something without using exactly the same method not only helps people learn by rote repetition, but also gives them multiple approaches to understand you.

1. Say it twice
   a. "Prickly pears are the hardest to pick."
   b. "Of all the fruits you harvest, prickly pears are the most difficult to pull from the plant."
2. Say it more than twice, if you can
   a. "If you grabbed a prickly pear in one hand and a plain pear in the other and pulled, you'd have a plain pear in one hand and a painfully pricked palm with still pricking pear in the other."
3. Say it by making them say it
   a. "What's the hardest pear to pick? Say it with me now, the prickly pear."
4. Say it again by explaining why you are saying it
   a. "Who cares that prickly pears are hard to pick? You do! Why? You'll need to save more time for them to be picked and you'll get more damaged pears per order because picking them is so hard."
5. For exact details of a factual point, you have to say it the exact same way. Make it different by doing so *over time* and with *different patter* before and after it
   a. Do just enough to establish a pattern in the supporting patter, then break it
   b. "The password to the prickled pear pantry is: 8675309"
   c. Set an alarm to go off every ten minutes
   d. Ten minutes later when it goes off, ask "What is the prickled pear pantry password?", hear their answer, say "Yes" or "No", then say "it's 8675309"
   e. Ten minutes later when it goes off, ask "What is the prickled pear pantry password?", hear their answer, say "Yes" or "No", then say "it's 8675309"
   f. Ten minutes later when it goes off, ask "What is the prickled pear pantry password?", hear their answer, say "Yes" or "No", then say "it's 8675309"
   g. Ten minutes later when it goes off, ask "What am I going to ask you?", hear their answer, sat "Yes" or "No", say "What is the prickled pear pantry password?", hear their answer, say "Yes" or "No", then say "it's 8675309"
   h. If they get it right, turn off the alarm, if they don't leave the alarm on and repeat yourself until they get it right
   i. Regardless, twenty minutes before the training ends, ask "What is the prickled pear pantry password?", hear their answer, say "Yes" or "No", then say "it's 8675309"
   j. Right before the training ends, ask "What is the prickled pear pantry password?", hear their answer, say "Yes" or "No", then say "it's 8675309"
   k. Is this boring? Yes. Is this repetitive? Only as much as it has to be. Will they know the password to the prickled pear pantry? You better believe it.

> ⊘ **Let's get meta**
> Why did I pick 8675309 as the example password? (The answer is detailed earlier in this page, but searching for "8675309" exactly won't find it.)

Say a different thing the same way

A good structure will already showcase how some things are best explained as variations on a theme. When you present such things, emphasis the repetition.

1. Draw, diagram, or write similar things in similar ways
   a. Use the same color for things of their similar type
   b. Put them near each other in terms of physical layout
   c. Say their names in the same stupid accent and do the same stupid fist pump gesture afterwards for each one
      i. You laugh, but this is one way to Be Entertaining, Be Engaging, and Be Repetitive all while using a structure that

supports learning and fits your topic

Be Exemplary

Use examples and narratives to explain your topic. Tell a story of what your audience will do with the knowledge they gain from your training.

1. Use real people from your audience by name in your examples. This makes it personal and engaging
    a. "So let's say Rebecca needs to de-prickle and pickle 20 prickly pears..."
2. Use specific supporting details in your examples. This makes it memorable and easier to imagine
    a. "...to make five pickled prickly pear pies, all by next Thursday..."
3. Use ludicrous supporting details in your examples. This makes it entertaining and even more memorable
    a. "...because the local clown college needs practice pies for pie throwing class."
4. Use specific and ludicrous supporting details in your examples
    a. "So their teacher Chuckles is coming in less than a week and she's expecting five pies!"
    b. *(Did you notice how both this point and its example are also using repetition?)*
5. Use your examples to setup questions (Be Interactive) of what you've already covered (Be Repetitive)
    a. "What should Rebecca do first to procure them?"
    b. "How long will it take to procure that many prickly pears, Mike?"
6. Use on-going examples for topics
    a. This gives you one example from start to finish instead of multiple examples where each one is new, yet unconnected
    b. This works well for topics which cover a process in steps
        i. "And that's how you prepare them once they're procured. Back to that pie order from the clown college. We've got the prickly pears. Rebecca, how would you de-prickle them?"
    c. Create a narrative or story for other types of topics
7. Use similar but different examples where on-going examples don't fit
    a. "Cleveland Clown College called again and they need more pies, but it turns out the teacher Chuckles is allergic to our pickling poultice. She wants eight pies this time, but with plain prickly pears. Walk me through procurement and preparation, Mike."

Be Responsive

Sharing knowledge involves the active work of the giver and the receiver. This is really just a part of being interactive and engaging. It is so important, however, that it bears repeating. Every time someone asks you a questions they are acting on their engagement. The worst thing you can do is end that engagement by not addressing their question.

1. Encourage questions
2. Answer every question
    a. Even if the answer is off-topic
    b. Even if the best answer you have is: "I don't know, but I'll find out and get back to you."
3. For questions which are (or will take you) off-topic
    a. Provide a short answer anyway
    b. Provide an avenue for further details later
    c. Redirect back to the main topic like you do with other distractions so you can Be Engaging

Be Timely

There is no secret trick to making sure you cover the material you have in the time you have.

1. Bring a timer
   a. There's an internet full of them
   b. And your phone probably has one
   c. Old fashions wrist watches work, too
2. Set alarms
   a. Estimate the length of each section, if you can
   b. Use alarms of a fixed interval, if you can't estimate yet
      i. 15, 20, or 30 minutes is usually good
3. Use visual alarms

> ✅ **Let's get meta, again**
> We already gave you a tip that this guide has a structure. This guide uses repetition, real examples, reviewing as you go, creating a dialogue, and encapsulation as well. Look back up the page at the first tip called "Let's get meta". Can you see how that tip box is using repetition? It's going over the ideas of general and topic specific structure that were explained just before it. Did you notice that this tip box is doing the same thing? (That is, it is repeating the material covered in the previous section.) Do you see how (admittedly rhetorical) questions like these help create a dialogue? People naturally try to answer a question when they read or hear it. That takes you from passive reader to active thinker.
>
> Like every structure, each section itself is an example of encapsulation. The general structure section lets you focus on a subset of related details, without worrying about the others. Having a tip box after each section is a way to review as you go, and talking about the guide itself is a way to present a real example.

Previously: Structuring Training Plans

Next Up: Making Training Plans

Making Training Plans

> *Preparing prickly pears is precisely like perfecting a training plan in that I talk about both of them in this guide, even though I only talk seriously about one of them. –Erskin*

A training plan is, at its core, an outline of notes to guide the presenter on how to cover the topic. Often there are additional materials which support the outline. These could be external applications, tools, or websites; photos or reference diagrams; physical handouts, toys, or tools; or screenshots as backup for when live services are down.

Creating a new training plan is making this outline, and preparing any supporting material needed. Assuming the presenter knows the topic, the outline is a step by step guide of how to cover the material.

> ✅ **Keep it simple**
> Create your outline as a wiki page. You get easily nested list controls, it's searchable, stored where everyone can get to it, easily editable (and change audited), and still easily exported to other formats. If you hate the wiki editor, use a text editor or whatever tool makes you happy, then paste the results to the wiki. Just don't use extra fancy features. The simpler the outline is, the simpler it will be to keep up to date.

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Start with the general structure

Create a copy of the Training Plan Template. For the steps common to all topics, go ahead and the specific details for your topic. That is, fill out any **TODO:** parts in the first six and last four sections.

> ⚠️ **Don't ruin your vacation plans!**
> Notice that the template doesn't have a **TODO:** for the *Who am I?* step. Don't assume you'll always be the trainer. Yes, job security is nice, but time off is better!

1. Make sure you have considered all possible attendee departments, and their goals
2. Make sure you have considered all possible prerequisites
3. Remember that the topic summary and individual goals are crucial, don't be afraid to put some work into making them perfect here

Layout your topic specific structure

Using the topic specific structure you've chosen, outline the topic step by step. The structure should guide you on how to cover the material. The decisions at hand are just how specific to make each step in the outline.

1. Steps should be *just specific enough* for someone who knows the topic to understand what information to present next
2. Steps should talk about each detail separately
3. Steps should include exact details instead of relying on a presenter's memory or best guess
   a. When summarizing an idea or presenting a definition, give the exact text
   b. Examples used should be complete in all details in the outline
4. The outline's job is to provide all the details of *how* to present the information
   a. This lets the presenter can focus on the audience
   b. And keeps the presentation consistent so that improvements can be made as they are discovered
5. The outline's job is **not** to replace a knowledgeable presenter
   a. This keeps the outline maintainable

Review for interactivity and clarity

Once the initial outline of the topic is done, go back and look for ways to improve the effectiveness. Use all the tips on successfully presenting information. In particular:

1. Can you replace steps where you "tell" things with "doing" or at least "showing"?
   a. Make your outline Engaging and Interactive!
2. Did you include explicit steps to explain things from your expect audience's perspective, including repeating new information?
   a. Make your outline Empathetic and Repetitive!
3. Did you include explicit steps to review information as you go?
   a. Make your outlineBeRepetitiveRepetitive!
4. Are there enough examples? Are they consistent and the best than can be?
   a. Make your outline's examples Exemplary and your outline will be more Engaging and Interactive!

Create supporting materials

Now that your outline is in good shape, you'll need to create or otherwise acquire the support materials it needs. Ask yourself these questions about your support materials:

1. Can I use a real physical material instead of a virtual one?
   a. Nothing is more hands-on than literally putting your hands on it!
2. Can I use an interactive live version instead of a screenshot or photo?
   a. Live systems mean you don't need to keep your screenshot, photo, or other local copy up to date and are more interactive
3. Do I have all the backups I need in case something goes wrong?
   a. For example, if internet access is spotty, can you keep a local copy of what you need?
4. How do I reset everything for the next training? What do I need to do to make the materials back to the way they started?
   a. For example, you can keep a backup copy of digital files that will be modified during training
   b. For consumables, you may need to order more after each training use
5. Have I added steps to my training plan outline to cover all this?
   a. Any additional setup or requirements for the start of the training?
   b. Any final cleanup, reset, or reordering of materials after the training ends?

Do something else for awhile

Editing your own work is hard. Take a break and get some help before the final review.

1. Wait at least one day without looking at your outline or thinking about it before doing anything more with it
2. Get someone else to go over the training plan with you

Review for correctness

As a final review, you'll need to check that what you've created does what you expected, both in theory and in practice. With your fresh eyes and those of a friend, review your training plan outline.

1. Confirm that the information covered by the outline is enough to meet all the things listed as goals for attendees
2. Do an actual dry run of the training and time it
   a. Note the approximate time for each major set of steps so you can be timely when presenting to a real audience
   b. This should be a full, end-to-end test, so that includes things like:
      i. Were you setup on time with everything working?
      ii. Did you have the surveys up and working? Did you fill some out to make sure? (See the Maintaining Excellence section on Surveys.)
      iii. Did you go through the practical test of what was taught? (See the Maintaining Excellence section on Practicals.)
3. Fix all the things that didn't work but you didn't find out until you did the dry run

Previously: Presenting Information

Next Up: Maintaining Excellence

Training Plan Template

Use this template as the starting outline when creating new training plains.

1. What is this?
   a. **TODO:** Training Topic Title Goes Here
2. Who am I?
   a. Give folks a name to ask questions of
   b. Give enough background to establish your knowledge of the topic
   c. Establish the pattern for introductions
3. Who are you?
   a. Write down everyone's name and department
   b. Arrange them to match the seating arrangement next to your own name
   c. Draw a rectangle to represent the table if it helps
4. Where are you?
   a. **TODO:** List prerequisites for this training
5. What are we learning about?
   a. **TODO:** Provide basic definition of the training topic
6. Why do you care?
   a. **TODO:** For **every** expected attendee department, provide a goal of what that department's attendees should learn from this training
7. **TODO:** Topic specific structured outline goes here
8. What did we learn about?
   a. **TODO:** Review the basic definition of the training topic
9. Why did you care?
   a. **TODO:** Review, for **every** expected attendee department, their specific goal
10. Who am I?
    a. Restart your name and contact information
11. How did I do?
    a. Specifically request feedback on the training
    b. Have attendees fill out your post-training survey before leaving

Maintaining Excellence

> *Prickly pears rot unless pickled* or otherwise preserved. Your trainings can be rotten, too, but you'll need more than a sharp nose to know. *–Erskin*

In order to make sure the training you have is good both now *and* later, you need a way to measure the results and process to do something once you know what work and what doesn't.

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Measuring Effectiveness

There are two ways you should track your training success: what people say, and what they do. If people don't like the way you train, they will stop listening to your trainings. Even if they do listen, if they can't do what the training was supposed to teach them, you still need better training.

Surveys

Get direct feedback using surveys at the end of each training session. Include both quantitative questions and open-ended questions. That said, keep your survey easy to fill out. Provide everything needed to complete the survey. Online surveys are great if everyone has laptops or enough computers are available in the training location. If you use paper surveys, remember to bring pencils as well. Make sure your surveys have the topic and trainer filled out on them beforehand. Use this generic example as a starting point for the surveys for each of your training topics. Trainers should also provide feedback, either with the same or a different survey as those attending the training.

1. On a scale of 1 to 5, with 5 being *Very Effective* and 1 being *Not Effective*, how effective was your **training** today?
2. On a scale of 1 to 5, with 5 being *Very Compelling* and 1 being *Not Compelling*, how compelling was your **trainer** today?
3. What did you like the most about this training?
4. How could this training be improved?
5. Do you have any other questions, comments, complaints, or concerns?

> ⊘ **Starting using a survey now!**
> Google Forms make for an easy and fast way to get a survey going. While it doesn't make it easy to automatically fill in things like the training topic and trainer name, it's still enough that there's no reason to ever give training without a survey. Here's an example form you can copy.

Practicals

Test what people have learned through practical application. Do this a part of training itself. Academic schools do this after the training and call it testing. Technical schools call it certification. You will do it to make sure your training succeeded. The best way to do this will vary wildly depending on the training topic. Regardless, make sure you meet these requirements:

1. Provide a practice environment that mimics the real world as much as possible.
   a. This can be done with virtual machines on a computer, role-play with other people, or any others means of simulation.
   b. If at all possible, make the practice environment available to everyone, all the time.
2. For every person trained must prove through use that they learned the material presented in the training.
   a. For topics about performing a task or using a skill, have each person perform the task in a real or simulated environment.
   b. For topics about knowledge, have each person work through a situation, real or simulated, where the knowledge would be needed.
      i. Test of rote memorization are boring. Avoid them at all costs.
      ii. Even an arbitrary scenario where the knowledge is used to accomplish an imaginary goal is more engaging than blindly repeating facts from memory.
   c. Frequently remind everyone, yourself included, that the only goal is to get everyone comfortable with the training topic. There is no failure, just someone who hasn't yet succeeded. Communicating this needs to be part of the process for doing practicals.
3. Keep records not only of who attended the training, but of who successfully used what they learned in the practical.

> ✓ **Let's get meta**
> You've almost read this whole guide. How do you think we might check that you understood it? Notice how this guide is full of numbered checklists? Those provide a list of things to check for someone reviewing a training presentation (and trainer). When creating training outlines, you'll need to create the practical as well. The more you can make the practical a part of the presentation itself, the less additional work you'll need to do.

Continuous Improvement

Feedback is useless unless you do something with it, and even a perfect training plan can become out of date over time as things change. Changes in your audience can also make otherwise great training less effective. Finally, feedback and improvement is for more than just your training plan, it's for you as a trainer as well.

1. Establish a regularly recurring review of feedback both across all topics, for each topic in particular, and for each *trainer* in particular.
2. Establish a regularly recurring review of training plans to ensure they are up to date on their topic.
   a. Where ever possible, any process which changes material the training covers should also update (or at least mark for future update) the associated training.
   b. Consider adding new topics, removing old topics, and combing or splitting topics if needed.
3. Establish a regularly recurring review of who attends your training both across all topics and for each in particular.
   a. Pay attention to how changes in your audience can help you improve training.

Previously: Making Training Plans