



# Book Training Design & Delivery

Geri McArdle  
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## Recommendation

Whether you train, manage trainers or are merely interested in the topic, this little guide offers plenty of useful information. Geri E. McArdle not only helps you understand the importance of training and what it takes to train well, she also provides a 20-step model to guide you in creating your own first-rate development program. The steps take you through six crucial areas of training, from determining if training can actually solve a problem to developing, delivering and assessing your sessions. You can use McArdle's model as a checklist for ensuring that your learning programs don't lack a crucial ingredient. Her concise book, packed with handy advice as well as useful tables and diagrams, is especially effective in defining trainers' responsibilities. However, this guide's breadth of knowledge far exceeds its depth. You may have to turn to other training resources for detailed information about a specific topic. *BooksInShort* recommends this as an introductory guide to all that good training requires.

## Take-Aways

- Training helps companies stay competitive and increase their employees' value.
- Your credibility as a trainer depends on your knowledge, confidence and ability to hold people's attention.
- Before you begin a training program, confirm that it can really solve the company's performance problem.
- Then use the 20-step "training system model" as a checklist to ensure you are delivering great training.
- Design your training to meet company objectives. Use several instructional models.
- Research your participants' work responsibilities and learning styles, and tailor your curriculum accordingly.
- Don't create rigid lesson plans. Give yourself room to fit in a spontaneous exercise.
- Your material should include good graphics and be easy to grasp.
- Seek class members' ideas for improving your course. Use that information in planning future training sessions.
- Gain managers' support by helping them understand your training program in terms of solid return on investment.

## Summary

### Why Is Training Important?

Employees must continue to learn and advance to have a viable career in a modern corporation. As technology changes and organizations adapt and grow, work responsibilities will evolve. A company's training programs should be equally dynamic. They should address its current training need, whether that is teaching new skills, helping employees "explore and select a work path," enhancing teams' effectiveness, or increasing overall productivity.

"Learners demand easy-to-use materials, with content that focuses on direct application to the job."

Many forward-thinking trainers are creating programs that not only impart specific knowledge, but also help people cope with change. These trainers teach relevant and up-to-date techniques and offer insights into possible future trends. They show professionals what they can do to stay ahead in the rapidly changing marketplace.

### Approaches to Training

People want learning to be an interaction. They rarely tolerate a trainer who lectures at them. Consider your content and the program structure. Do you focus on

practical job-related applications rather than on theory? Is your course clear and modular? Do you offer “easy-to-use materials” that include graphics? Will your handouts be helpful to people when they return to work?

“Through training, individuals can learn how to accept responsibility for their own shortcomings and developmental needs in order to manage their careers wisely.”

Trainers should be gifted teachers as well as subject experts. This involves being sensitive to the different ways people learn, including visual, auditory and kinesthetic modes. As you interact with your participants, identify how they take in information. Are they “global processors” who need to know the “big picture” right away, or are they “analytic processors” who first want to understand the details? Adapt your role to class members’ preferences.

“Although there is no one comprehensive learning style theory that all researchers and trainers agree upon, they do agree that individuals learn differently.”

Training does not have to be anchored in a classroom. Some courses have moved outdoors to teach team building and leadership. Training via computers and networks is also growing increasingly popular. It offers opportunities to tailor education to individuals’ needs. People can learn at a time convenient to them and repeat lessons as necessary.

## Trainer Credibility

Aristotle said, “Three things inspire confidence in character...good sense, good moral character and good will.” Keep these qualities in mind as you try to build credibility as a trainer. Carefully manage all aspects of your training program, including your role as the class leader, your body language, the way you use the classroom space, and your voice. Heed the “10 rules of a leader”:

1. Control the agenda and don’t wander from it.
2. Have course goals and teach to accomplish them.
3. Be fair and respectful toward those you train.
4. Listen to people, so you know if they understand the material.
5. Periodically review the information you’ve covered.
6. Encourage people to make connections while summarizing important points.
7. Hold your class’s attention. Help people focus on the lesson.
8. Always maintain your authority.
9. Find a way to engage quiet or uninvolved participants.
10. Offer “clear direction.”

“Trainers should teach what they know and know what they teach. They should be confident, organized and well-prepared.”

Being credible and having authority involves managing questions well. Do not allow off-topic questions to distract you or the class, but provide clear, direct answers to relevant ones. Use a five-step process to respond effectively: 1) “listen,” 2) “acknowledge the question,” 3) “ask for clarification,” 4) “answer the question” and 5) “verify that your answer is acceptable.” If you don’t know the answer, don’t risk responding to it. Simply say that you will return to the question once you have had time to do some research.

“The purpose of establishing a training system in an organization is to ensure you design programs that respond to the organization’s business needs, are educationally sound and have measurable product learning.”

Be aware of how you use space in your training sessions. People have personal boundaries that vary by culture. Most consider the area within a foot (approximately 30 centimeters) or two of their bodies as intimate. Normal communication takes place within two to five feet, and formal communication beyond 12 feet. If you are leading a formal training course, avoid coming nearer than 12 feet. You could make people uncomfortable. However, if your program is more casual, you can interact closely with participants, walking among them and sitting in their groups.

“People can learn leadership by using others as role models and by attending effective training programs.”

Communicate your confidence and honesty through nonverbal and verbal signals. Dress in a way that indicates authority but is also inviting. Maintain good eye contact with your participants. Do not zoom in on just a few individuals or on one side of the room. If you are anxious or bored, avoid letting your face betray those feelings. How you use your voice also has an impact. Be sure you are heard, but do not shout. Don’t undermine yourself by apologizing, making weak jokes or talking off topic. Enunciate clearly while maintaining a comfortable speaking pace.

## “The Training System Model”

The 20-step training system model has six key functions. Use this method as a checklist to address every part of a successful training experience.

“The first thought that pops into people’s heads is to train the problem away. However, solutions other than training should be considered.”

The first function is justifying your training and diagnosing your issues, tactics, and return on investment (ROI):

1. **“Identify training needs”** – To understand what problem the training should solve, talk to the people who identified the issue and ask them why they think it matters. Use questionnaires, interviews and work records to clarify the need further, determine its worth and assess the costs of not addressing it. This information will help you decide whether training can help, and how.
2. **“Determine training solutions”** – Training cannot fix some problems. To help managers decide if it is the best strategy, conduct a “business analysis.” Indicate what concern you are addressing and how training can help. Examine any factors that may affect the program. Are the necessary resources available? Are there

- any limitations managers should consider? Be sure to identify alternative ways in which the company could deal with the problem and what they would cost.
3. **“Estimate return on investment”** – Although you won’t have enough information to calculate the actual ROI at this early stage, you can make a rough estimate of your training program’s costs and benefits. Include “hard data,” such as costs and time, as well as “soft data,” like customer and employee satisfaction.

“People are more likely to complete training successfully if they are told at the outset of the session what the goals of the training are.”

The second function is researching the needs of your training program participants:

4. **“Identify learners’ needs”** – Get to know what capabilities participants currently have and which ones they need to develop. Design your program to close that performance gap. Identify whether their learning needs are “micro,” applying only to individuals or small groups, or “macro,” existing for the entire organization.
5. **“Perform a job-task analysis”** – Understand the duties that make up the employees’ workloads. This knowledge will help you look credible and well-prepared in your training sessions.

“The training you provide must...be easy for [people] to transfer from your session and replicate at their jobs.”

The third function is structuring your training program:

6. **“Develop a preliminary budget”** – Money matters, so spend it wisely. Decide if buying a training program or developing one is more cost-effective.
7. **“Prepare learning objectives”** – Create program objectives that help the company overcome any performance gaps and reach its development goals.
8. **“Consider relevant learning theory”** – Whether you prefer cognitive or behaviorist learning approaches, be aware that people process information in different ways. When designing or modifying training for adult learners, remember the acronym “LEARN.” Your course should be “Learner-directed,” and “Experiential” as well as “Able to be evaluated” and “Residual,” meaning it should build on what the participants know or have experienced. Finally, it should incorporate “Numerous instructional methods.”

“Always include your training team members to assist you in making decisions about the course curriculum, course training material and instructional materials.”

The fourth function is creating the training curriculum and materials:

9. **“Develop the curriculum”** – Balance lecture with activities and use exercises that make learning visceral. Your course materials and handouts should support learners in the classroom and back on the job.
10. **“Write the lesson plan”** – Use your course objectives as the focus of each lesson plan. You need to raise employee performance levels, not merely get through the class. Participants must come away with new skills and renewed energy.
11. **“Select instructional strategies”** – Plan instruction based on the number of participants, their learning styles and other factors. Don’t create lesson plans that are too rigid or complicated. Give yourself room to fit in a spontaneous activity.
12. **“Obtain instructional resources”** – Never assume that the necessary tools and equipment will be available on the day of training. Double- and triple-check that you have what you need and that your training budget can cover any crucial purchases.
13. **“Consider the legal implications”** – Employment law is a minefield. Review your training program carefully and have others do so to ensure that you are not exposing yourself to costly litigation, sanctions or fines.
14. **“Prepare the final budget”** – Now that you have a detailed training plan, you know which resources you will need to accomplish its objectives. Turn your preliminary budget into a final budget. Confirm that your organization will support it.

“The implementation of training – delivery – is what people will remember.”

The fifth function is providing the training:

15. **“Prepare the training program”** – Learn more about the classroom and your audience. Ensure that your materials will be ready.
16. **“Organize the presentation”** – You now know exactly who will be in your class, where it will be held and which resources are available. Carefully tailor your presentation to fit your audience and use those resources wisely.
17. **“Manage the audience”** – As you deliver your presentation, gauge the audience members’ reactions. Are they the responses you wanted? Know your material well enough to adapt it at a moment’s notice. Don’t deliver a canned script.

“The evaluation provides feedback to the trainer and to the learners. It allows you to determine the effectiveness and efficiency of your training program.”

The sixth function is evaluating the training:

18. **“Evaluate the return on investment”** – Measure the post-training performance of your class members and quantify the improvements. Use these and the actual costs to determine the ROI.
19. **“Revise the program”** – Survey the training participants and seek ideas for improving your class. Combine these with your observations about the course and the post-training results to help you design future training programs.
20. **“Review the final program with management”** – Nothing is more fundamental to the success of your training program than having strong management support. To achieve it, provide managers with a solid ROI that demonstrates the quantified improvements you helped create. Include statements of support from participants and their managers.

“How well management supports the learners and the instructor has an effect on training. If management does not encourage course participation and follow-up on the job, then training will not succeed.”

As a trainer, you have the power to strengthen each participant as well as your firm. Design your training to provide an optimal learning experience. Deliver your material in a conversational way. Be confident in what you know and earn your participants' respect by being organized and prepared, and by showing interest in them.

## About the Author

**Geri E. McArdle**, Ph.D., has written nine books on training and development, including *Conducting a Needs Analysis* and *Crisp: Delivering Effective Training Sessions*.

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