

Training classes for the faint of heart

By Robert D. Grossman

If you wonder why anyone would voluntarily listen to your expert advice, here are some pointers that will give you confidence.

Many times we find ourselves in the uncomfortable position of being asked to share some of the drivel that has accumulated in our heads over the years. Not seeing the expert looking back at you in the bathroom mirror, you wonder why anyone would voluntarily listen to you tell them how to do things.

Not surprisingly, training is becoming a bigger and bigger issue for companies large and small. As our jobs get more complex and the equipment we work with more sophisticated, it is next to impossible to find and hire people who possess the skills we need. Expanding the responsibilities of existing personnel and hiring people with basic skills, then training them are often the only two options we have. As someone already doing the job and needing additional resources, you are in a unique position to ensure the success of either option.

When a business provides training to employees, the three options are to hire professional trainers (either contract or in-house), look to manufacturers to educate your people about their products, or use existing people skilled in certain areas to cross-train others.

The hired gun

Using people dedicated to training is a double-edged sword. On the one hand, it is expensive. Whether hiring people in house to perform the function or having an outside training company handle the work, it is an added cost. In this day of declining margins, few of us are anxious to shoulder any of these. On the other hand, taking people away from their jobs, where they are, presumably,

making you money, and putting them somewhere else for a few days has its price. Usually the people you need to train others are themselves essential elsewhere. When they're not out doing their jobs, others slow down without the proper supervision and leadership.

Unfortunately, the choice of many companies is simply to ignore the training issue entirely: Save the money, and preserve the status quo. Although I hate to use absolutes, this is always a mistake. Your staff's knowledge and experience are truly your biggest advantage in the marketplace. If you don't keep up with the wheels of progress, you can sit back and watch your competition roll on by, or over, you.

A second factor in evaluating the value of professional trainers is the question of skill. They bring to the party the ability to communicate comfortably and effectively; in that area it is tough to find people in-house with that kind of panache. This sometimes slick presentation can at times be a mixed blessing. The people doing the training, no matter how good they are at putting on a show, do not ordinarily have the hands-on experience that is so important to pass on. People who have been doing the job might not be as polished and refined but can usually command the attention and respect of the audience on a different level — they've been there.

Going to the source

Our other outside alternative, going to the manufacturers of the products we sell and install, is worth some exploration simply because it is so underused. Whether directly or indirectly, through a manufacturer's representative or distributor, manufacturers have a keen interest in your selling, installing and servicing the heck out of their products. Any help they give you flows directly to their bottom lines. The key to getting this kind of help is to make it convenient for both of you.

Typically, manufacturers offer two kinds of classes: technical training and sales training. A sales class will usually cover features, operation and

a comparison to the competition. Try not to limit these classes to just your salespeople. One of your own technicians in the audience might be able to ask the kinds of pointed questions that bring the discussion around to your particular customers' requirements. If you find that your technical people have difficulty reconciling customers' expectations with the actual equipment sold, they would also benefit from this type of training. Learning what the manufacturer promises to the salesperson and in turn to the customer is often an eye opener for those who live in the land of electrons — and a golden opportunity to set the record straight. Conversely, many of your salespeople would benefit from the nuts-and-bolts technical training that is often reserved for those who carry tool boxes.

Doing it yourself

Now we come to the part we've all been waiting for. Chances are, no matter how often you use the first two options, a time will come when you need to develop your own training class. And chances are that you will be the one to stand up in front of those people and remember the times you silently ridiculed the person who was trying to teach you something.

Face it: We're not teachers, never want to be teachers and probably will never be comfortable or "polished" in front of a jury of our peers. Having been thrust into that spotlight far too often myself, I would like to offer some pointers that have kept the snickering at bay and helped me through. Because I work for a very large company, I often go to remote locations to teach complete strangers; you may not have the same situation, but I'm sure we've got some common ground.

What's in a name?

I prefer the name "workshop" rather than training class." One invites participation and feedback: the other implies a lecture. When people are told there will be a "workshop" on a particular subject, the image seems to conjure up a hands-on experience. The expectation of learning

is higher, and tolerance for hype or abstract concepts seems to be minimized. Although this might not be the ideal environment for learning philosophy or economics, in our application it is perfect. What you call your class might seem trivial, but getting people to attend in the proper frame of mind is paramount.

Before you begin, talk to as many people in your audience as possible to try to determine expectations. Even if it is a roomful of friends, your normal method of interaction has been altered — they will treat you differently, and you will feel different. Hand out a form and some pencils, either in advance of the session or when people are arriving, and make sure you get them back. Finding out specific questions will get you through the natural lulls and give you an anchor when the going gets tough.

Many professional talkers begin with a humorous story. If you can tell one well, by all means go for it — it relaxes your audience, eases the tension and shows that you're an all-around funny guy or gal. If you find your jokes always need to be explained or involve a farmer's daughter, let the professionals handle it. Look for a comic strip or cartoon that sets the tone of your talk, and show it on an overhead transparency or slide. (Be sure not to violate any copyright laws.) In our industry, it's hard to come up with any concept that Dilbert can't make funny.

Be prepared

As a rule, the better prepared you are, the smoother things will go. This is true in sales, installation, design work and training classes. I often put

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together a three-ring binder to hand out with more than 100 pages of supporting material. Although you might

not want to go that far, at a minimum, you should provide three things:

- *An outline of your discussion:*

Decide in advance what you will be talking about and in what order. You can always skip around if the audience warrants it, but you should know exactly what ground to cover. This will also allow you to determine roughly how long each segment of your presentation will take. Make sure to note all topics and specific items you want to cover so they aren't forgotten. If you can put together a slide show using presentation software, it certainly can jazz things up, but printing the outline and handing it out will serve just as well. I like to do both; the material on the screen keeps everyone focused on the subject at hand; the ability to look ahead at other subjects can give people a chance to formulate questions.

- *Supporting material.*

If you will be talking about specific products, provide copies of cut sheets or specifications, if feasible. I hate to hear, "Let me know, and I'll get you more information," or "I'm not sure, but I'll look it up for you," and I imagine my audience does, too. Instant gratification will help you better cover the subject and reduce the amount of follow-up work you'll have to do when your class is over.

- *A source guide:*

Let people know where to go (besides you) for more information. Specific contact names, companies and telephone numbers are always appreciated and reduce the amount of follow-up support you will have to provide. Be sure to contact people you will be including in your material to ask their permission. The last thing you want is for one of your carefully cultivated contacts to receive an avalanche of unexpected telephone calls, each bearing your name as the culprit.

Assuming that you're the person described earlier — strong on content but short on polish — all of this preparation will provide unexpected dividends. If the presentation material shows professionalism and organization, so will you. You will have a wall to hide behind if needed,

and any tension and nervousness will be minimized or forgotten.

Samples and examples

One of the reasons you've been chosen to talk to these people is your actual hands-on experience. With that in mind, don't be afraid to talk about the things you have done and the places you have seen. One of the most effective forms of advertising is the "before and after" picture, so take advantage. If you want to talk about the importance of a neat wiring job, show a photograph of a terrible wiring job. To describe the importance of labeling connectors, show what happens to a microphone that has been plugged into a 500W loud-speaker output. Whenever you want to show a clear case of black and white, right and wrong, seek out extreme examples from both sides, and show them off. If nothing else, you will prove your point in a lasting manner.

If you're talking about specific products, try to have samples to pass around. I remember one workshop I attended where cable was one of the subjects discussed because cable tends to be something that is often forgotten, sent to the lowest bidder or way down the list of priorities. The instructor made a point of passing around a section of high-quality, name-brand cable and the lousiest generic equivalent he had been able to find. What had been an abstract concept on paper soon became an accident waiting to happen: Something that we all wanted to avoid on our projects at all cost. Similarly, my company has cable manufactured with color-coded jacketing. The value becomes more apparent when you can put a sample in people's hands as you explain the benefits of any improvement.

Improvise

It is important that you remain flexible enough to deviate from your lesson plan, no matter how well scripted it may be. As each audience differs, so must each presentation. The surest way to send an audience to dreamland is to give the impression that you're standing there read-

ing them a bedtime story. If you get questions when discussing certain topics, see where you can go in that direction. Move to another subject or take a break if you start to get yawns when you cover other ground.

Try to relate your material to everyone in attendance. When you spend the time to get to know your audience, you'll be better able to point out benefits to people as you go along. If you're talking about the importance of power-line conditioners, tell the salespeople how often the competition overlooks it and why it's important. The technicians may want to know how many service calls they can prevent; customers would like to hear about the money they can save in the long run.

Although following some of these guidelines might not make you the most sought-after talker since Cohn Powell, they can make you more comfortable and your audience more responsive. As for knowing the material to be taught, being the expert is up to you.

Forethought and afterthought

At the beginning of each workshop, I provide two pre-printed forms on color-coded paper. The colors don't matter; they just need to be different from each other and the other material you will be handing out. These forms list the class name, a paragraph of text and some lines for the person to make notes. The forms ask for information on expectations and evaluation:

- **Expectations**

"Before this class or workshop begins, we appreciate your help. Please indicate below what your expectations are. What general subjects and areas would you like explored? Are there specific questions you need answered? Throughout the class, your questions and contributions are requested to help meet these expectations and those of others."

- **Evaluation**

"At the conclusion of this class or workshop, your comments are appreciated. Were your expectations met? Was material covered that you had not anticipated? What areas could be

better covered in future sessions, and where was there too much emphasis? Finally, what are your suggestions for making this class more helpful and worthwhile to others?"

Hand these out at the beginning of the class or when people are walking in, and ask that people take a few minutes to fill out the "Expectations" page before you begin. Collect that form, and use it as a checklist to modify your class outline and to gauge the subjects of interest. The "Evaluation" form is collected at the end of the session. Neither form asks for a name, but I mention that it is optional.

Now here's the reason for the

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color coding. If you notice people writing on the brightly colored "Evaluation" form during your talk (I use pink so it will stand out), take stock in what you are saying at those moments. Chances are you're giving out too much information and boring them on that subject, you're skipping to another subject too quickly and they're too shy to ask questions, or your fly is open. In any case, be sure to take corrective action immediately.

Casting your anchors

One technique I find helpful is what I call "casting anchors" throughout the class. Although I am sure a professional term for it exists — every time I come up with a good idea I find that everyone else has been using it for years — the concept is simple.

Throughout your session, put things aside that you can refer to later. These range from material gathered on your expectations form, colorful anecdotes, humorous examples and subjects or questions that arise during the workshop that might derail your train of thought at the moment. I keep a 3"x5" card listing these key items on the lectern or ta-

ble for instant access.

When you find that you are distracted or unhappy with the direction your talk on a subject is taking, take a look at one of the cards, and branch off onto one of those subjects. If you are getting bored with a subject, chances are that your audience is, too. Breaking the flow into a familiar pattern will give you time to think, reestablish contact with your audience, and then defuse a dud before it defuses you.

Self training

A final method of training that is probably the most common but least acknowledged is self training. Whether through technical publications, promotional literature or equipment manuals, the learning process never stops. The very act of reading this magazine proves that you are interested in continued learning. But if you're like most in our industry, it's difficult to keep up with all the material that is available to you.

Consider bringing magazines with you on trips when a spouse or friend is doing the driving and leaving some of the backlog in your car. This turns wasted time — lunches alone, traffic jams — into productive time.

Don't be afraid to tear pages out of magazines if you're not the type to save issues. In my office I have two 3-ring binders; one with articles I think will be helpful in the future and one with advertisements and photographs that might give me ideas when working on a design.

Finally, my favorite spot for evaluating those tricky manuals and tedious journals for which I never seem to make the time — the bathroom. If you put them there, and take out the People magazines, sooner or later you'll find the time to read them.

Who's really an expert?

I am reminded of a job I had at a cable TV station while I was in high school. We were doing a live show at the old Atlantic City Convention Center, and our camera position was right near the biggest spotlight I and my coworker had ever seen. During a

break in the taping, we worked up the nerve to ask the grizzly old spotlight operator about his job. After hearing how long he had been in the business and being duly impressed with his sage advice, we grew bolder and started to ask some questions. “How much power does that light draw?” my friend blurted out.

The old veteran took only a moment to look at the plate on the back of the lamp before replying “Five thousand Yonkers, Sonny.”

We had never heard of anything that pulled that much current and could only imagine just how powerful a Yonker could be. During another break, when the spotlight operator wandered off, we crept over to read the specification plate ourselves. And there it said, in black on silver: “Century Lighting Corporation, 5000 Yonkers, New York, NY.”

I have taken peoples’ expertise — especially my own — with a grain of salt ever since.

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