

Anexas Consultancy Services

Welcome to
ANEXAS EUROPE

Part A

Master Black Belt Training

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Introductions and Expectations

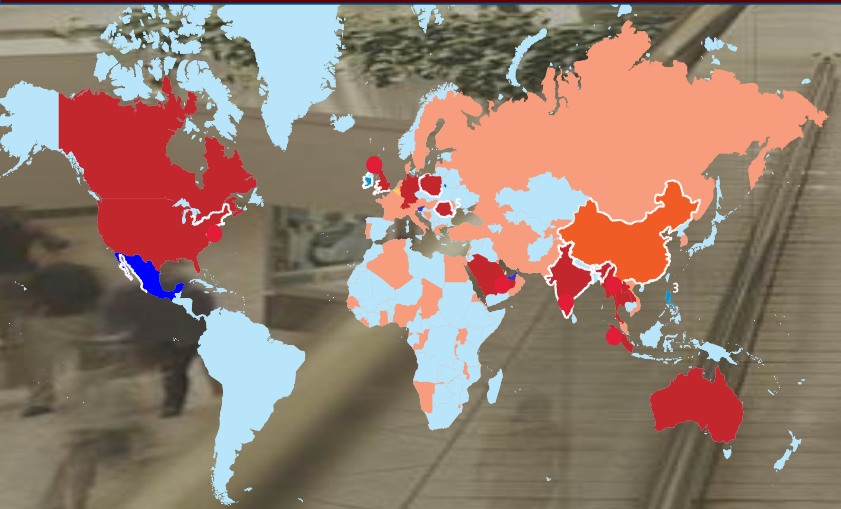
Introduce yourself to the group:

- Name
- Job
- Any one thing not many people know about you!



About Anexas

*Enabling individuals and organizations
achieve excellence
since 2006*



- Anexas is a global network of lean six sigma and project professionals serving the wide spectrum of industries. We operate in 10 countries and have 25 professionals in the team.
- Our mission is to help organizations and individuals achieve excellence.
- Trained more than 300,000 professionals in Lean and Six Sigma, Project Management and quality related trainings across the world from various industries.
- Lean Green Belts and Black Belts certified by Anexas have completed more than 5000 successful projects under our guidance.

Introductions and Expectations

Introduce yourself to the group:

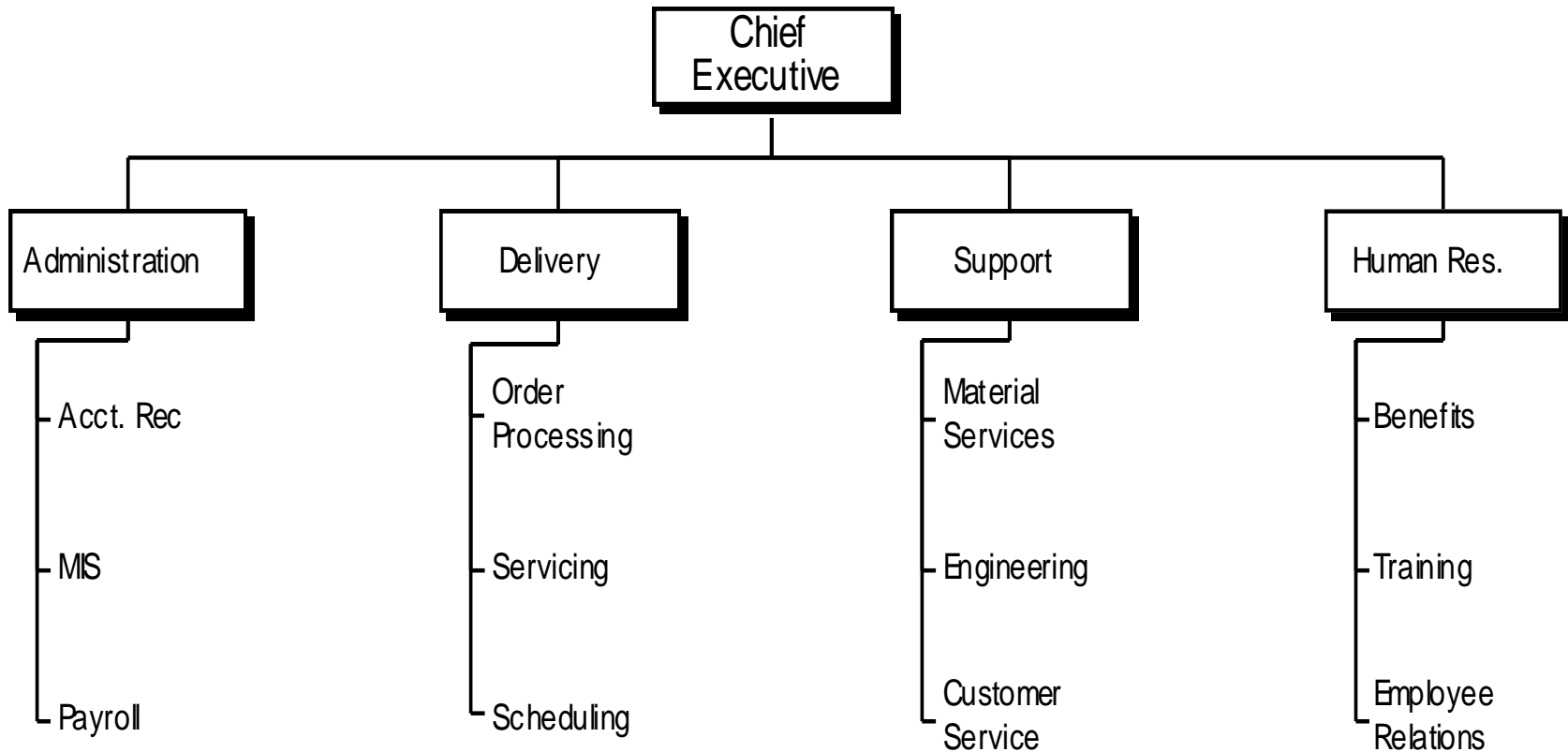
- Name
- Job
- Any one thing not many people know about you!
- Expectations for the session



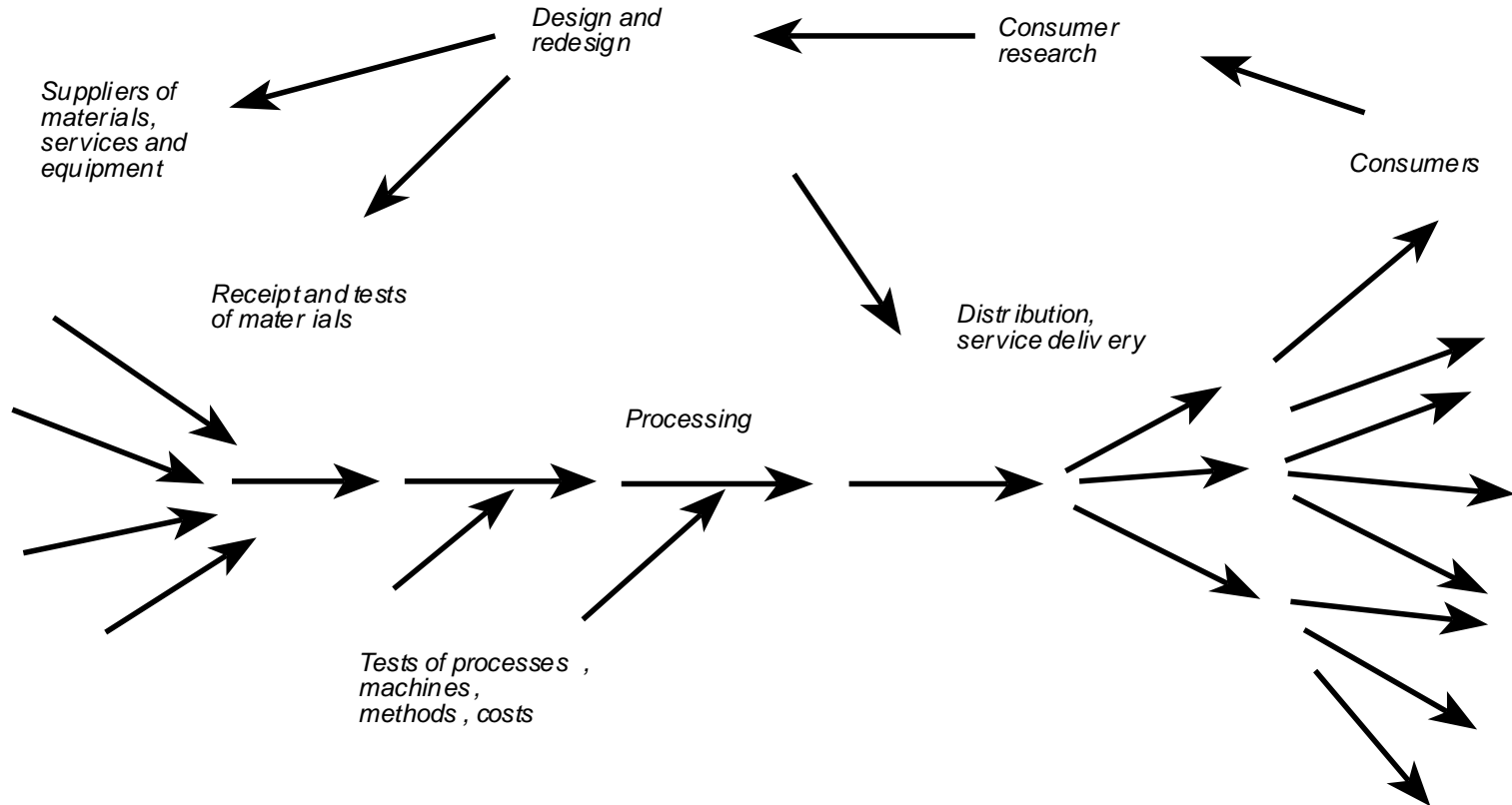
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Chapter 1: Systems Thinking

Conventional View of Business



What We Mean by “System”

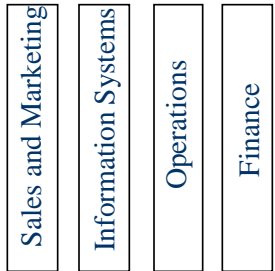


W E Deming 1950
A network of interdependent components which work together to achieve the main aim

W E Deming 1993

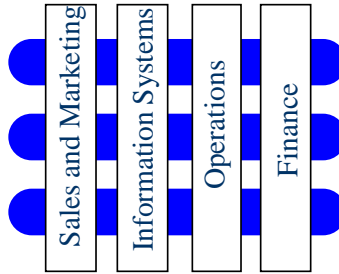
Going Horizontal

Functions Drive Organisation



→ Customer

Processes Identified But Functions Still Prevail



→ Customer

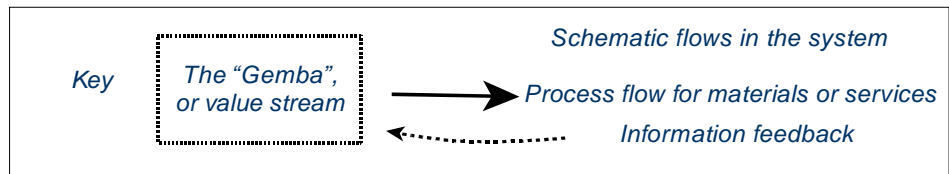
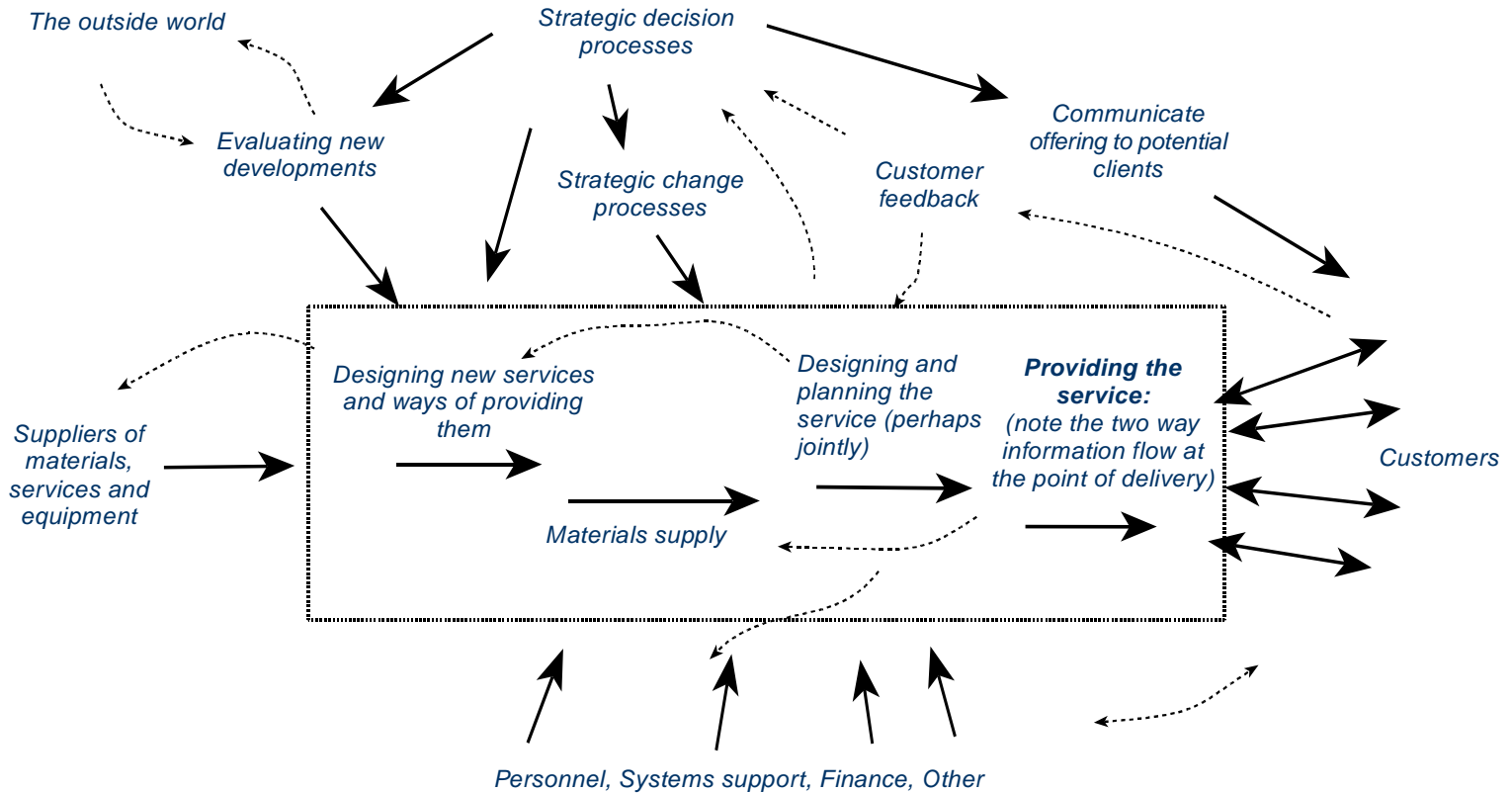
Processes Drive Organisation



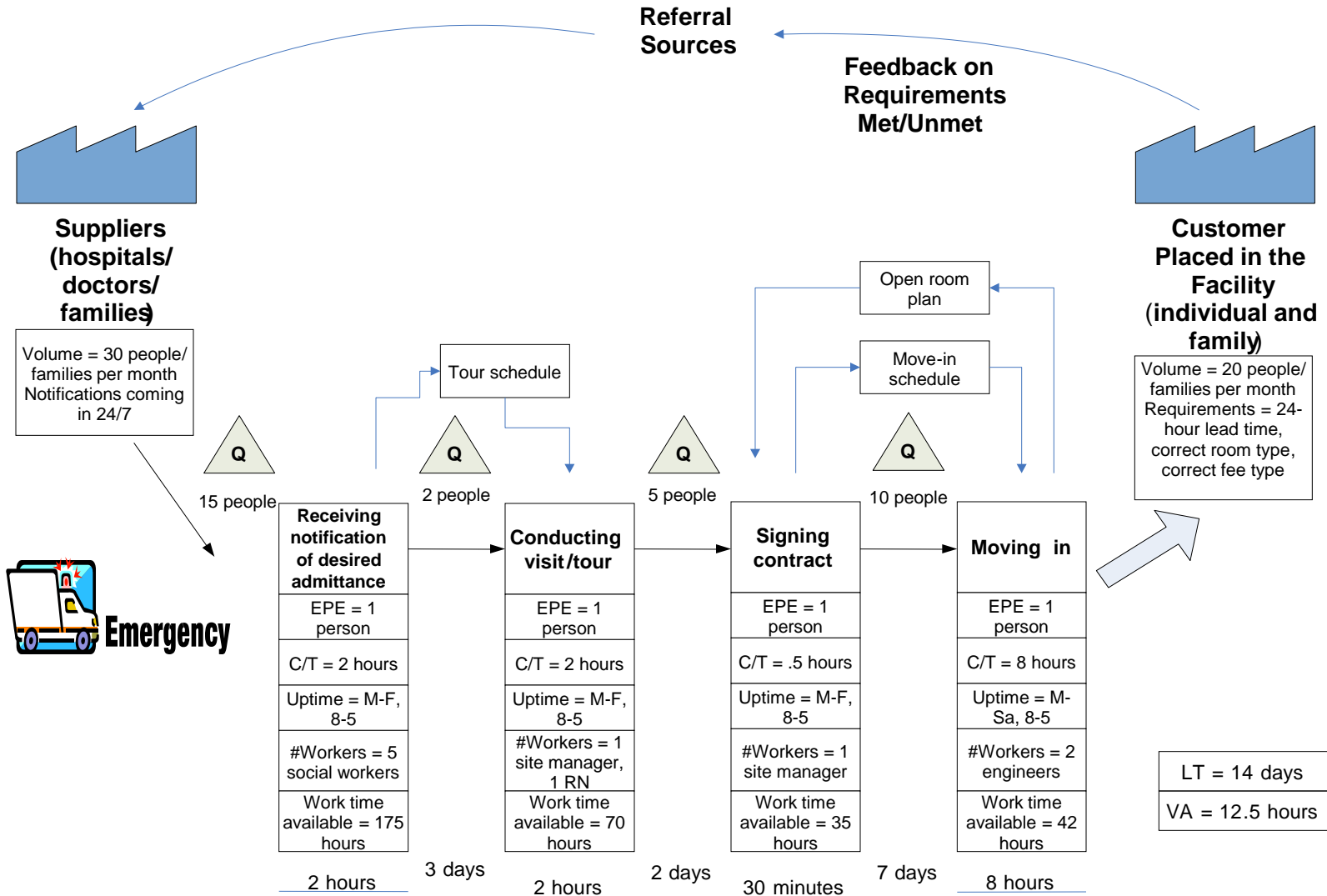
→ Customer



A Service System



Example

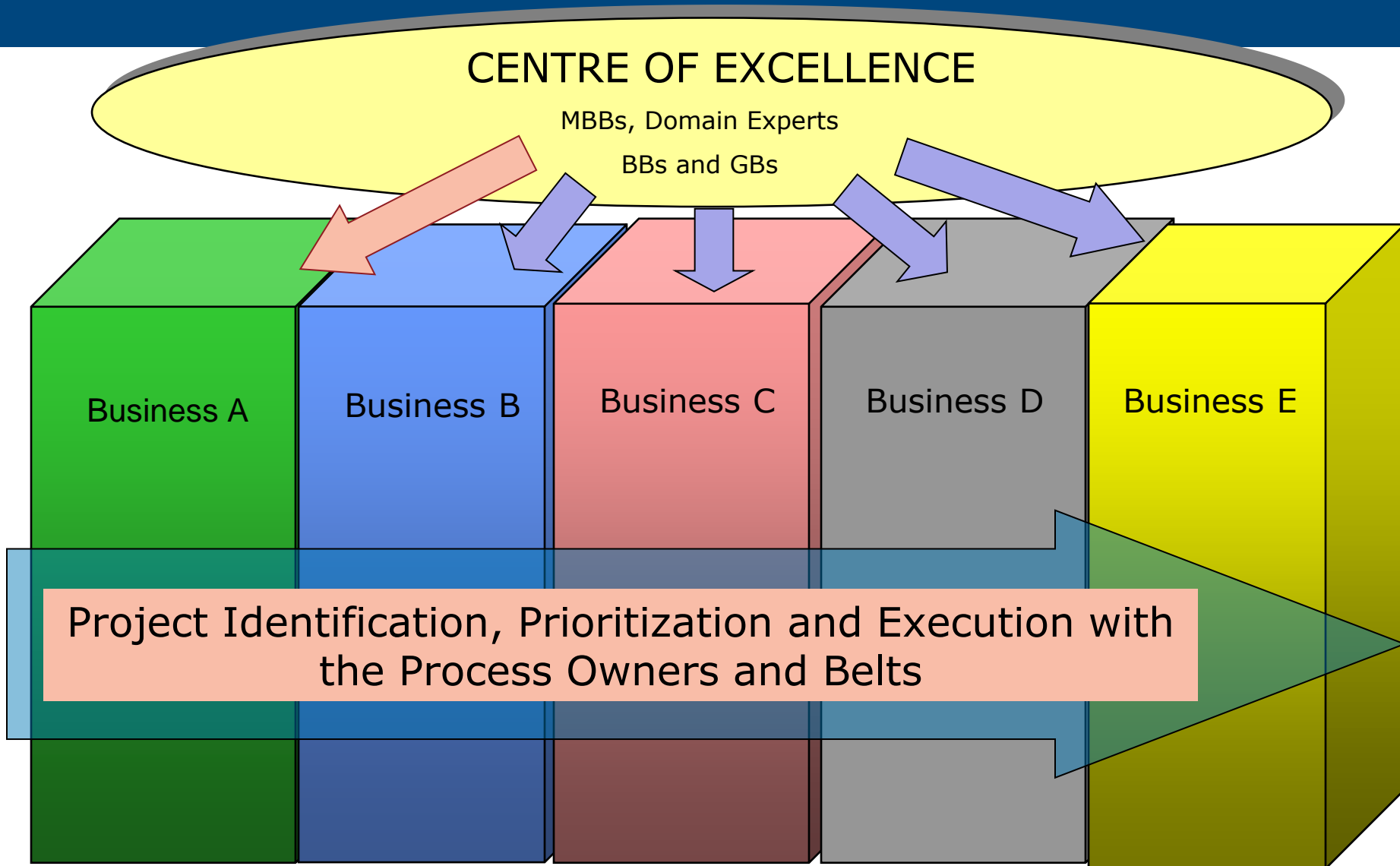


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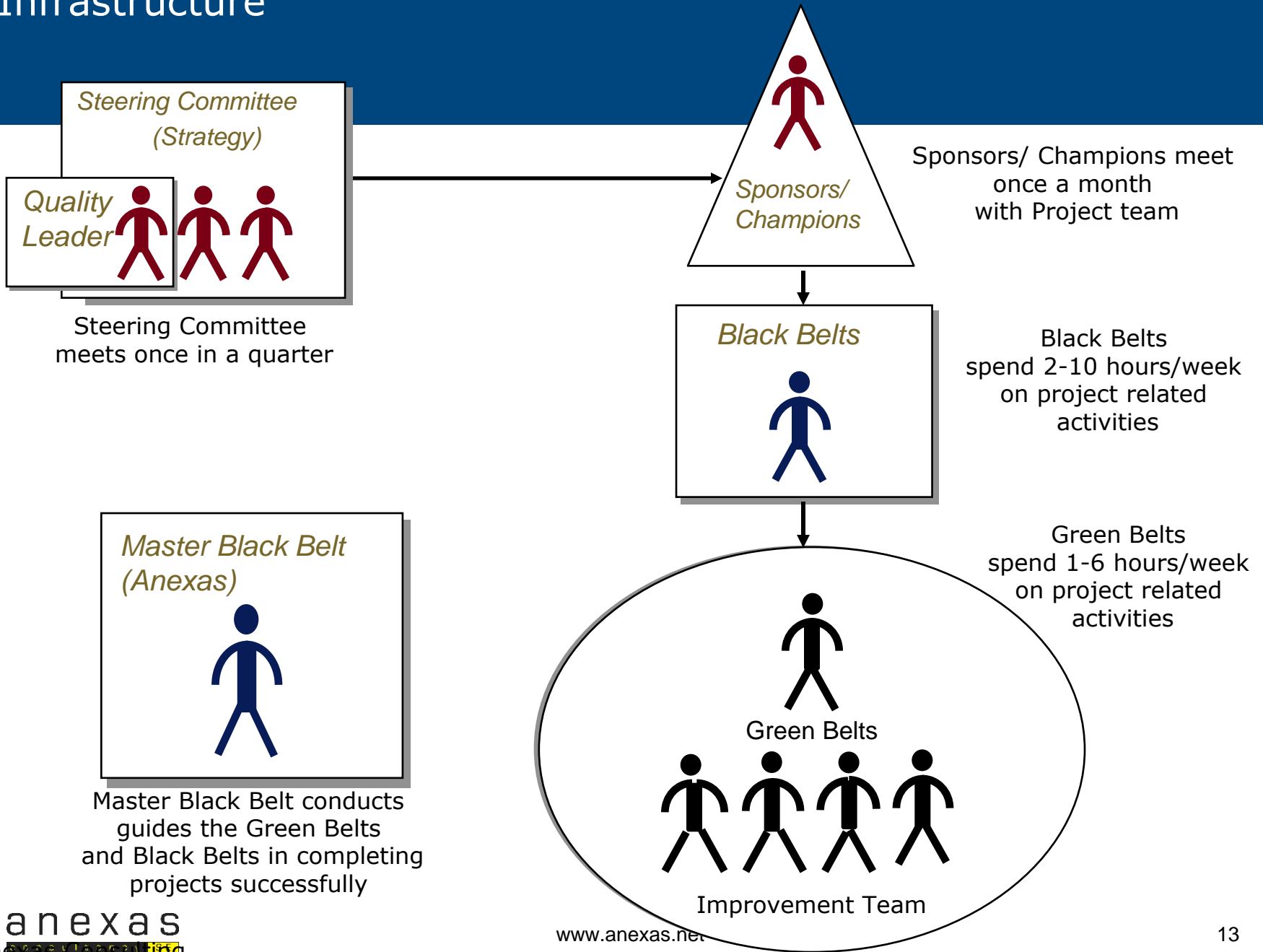
Chapter 2

Lean and Six Sigma Implementation Roadmap

Infrastructure – Long Term Plan



Infrastructure



4 Phase Approach

Infrastructure

Training

Project Support

Transition

Sponsors/Champions Training with business game

Project identification

Green Belt Training, project evaluation and certification

Black belts trained after successful completion of projects

Facilitation of Transition Plan

Our Approach...

We work with our client through the entire Lean and Six Sigma implementation with the aim of turning knowledge into value at each step

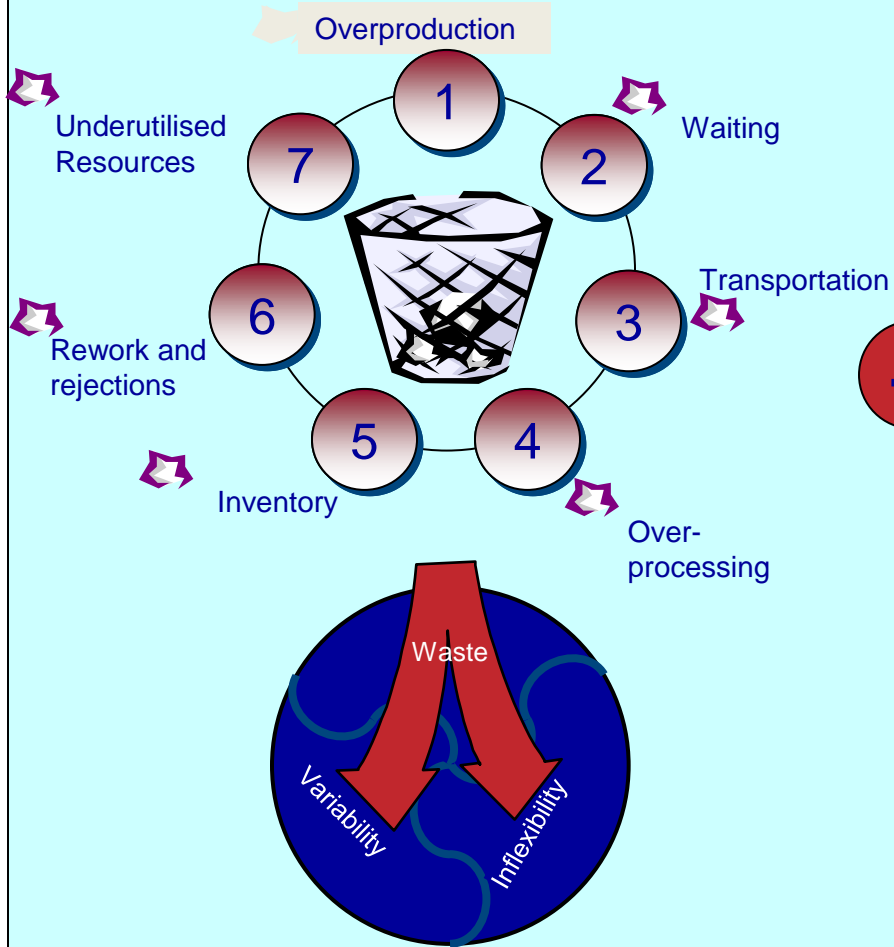


Hey I am Certified!

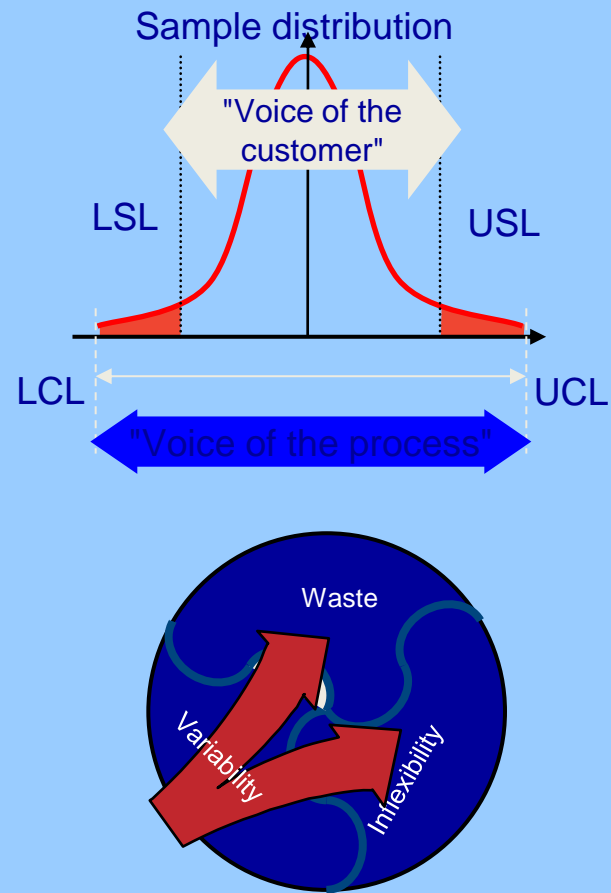


Lean and Six Sigma

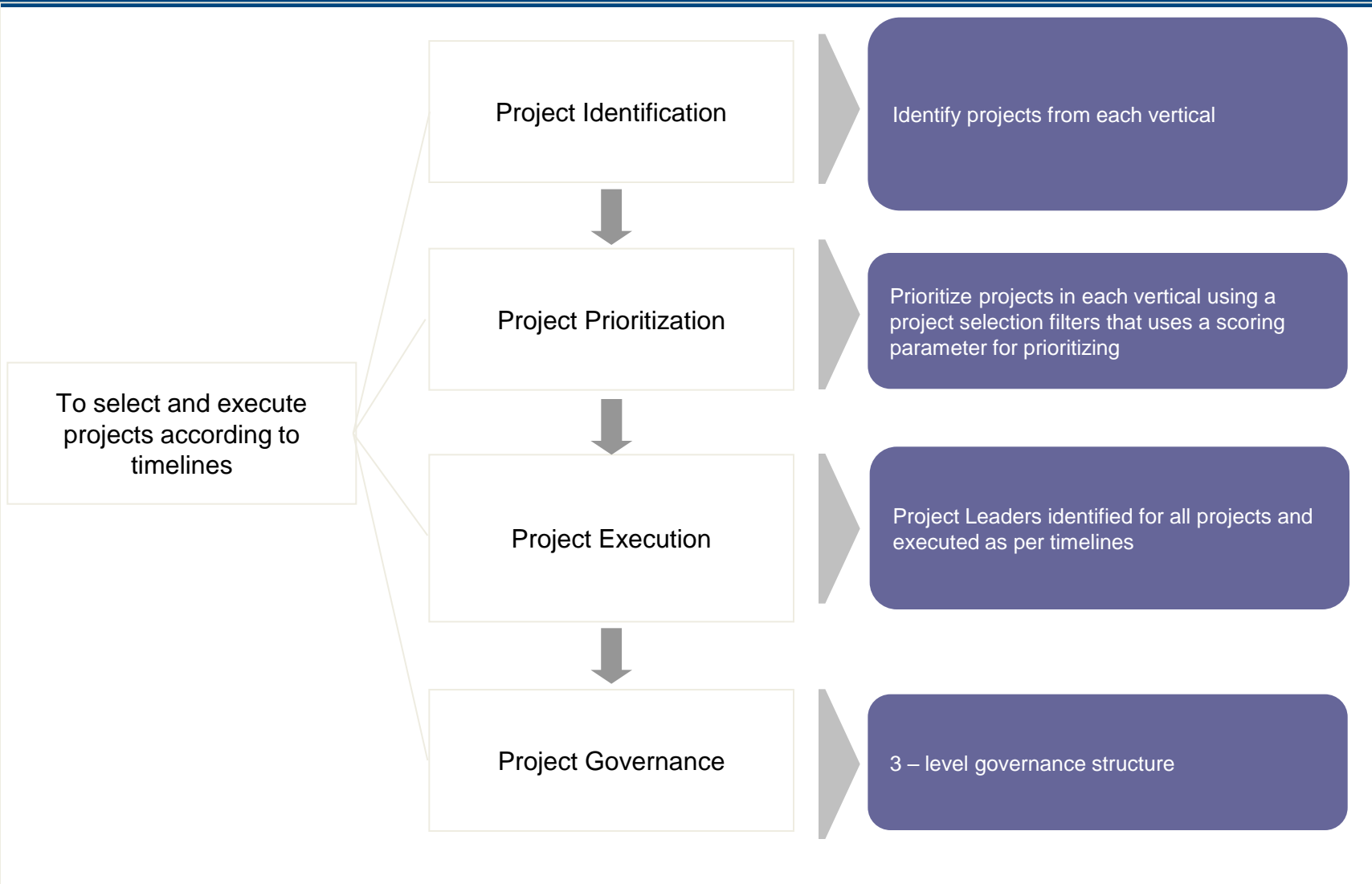
Typical primary Lean entry point:
Reduce waste



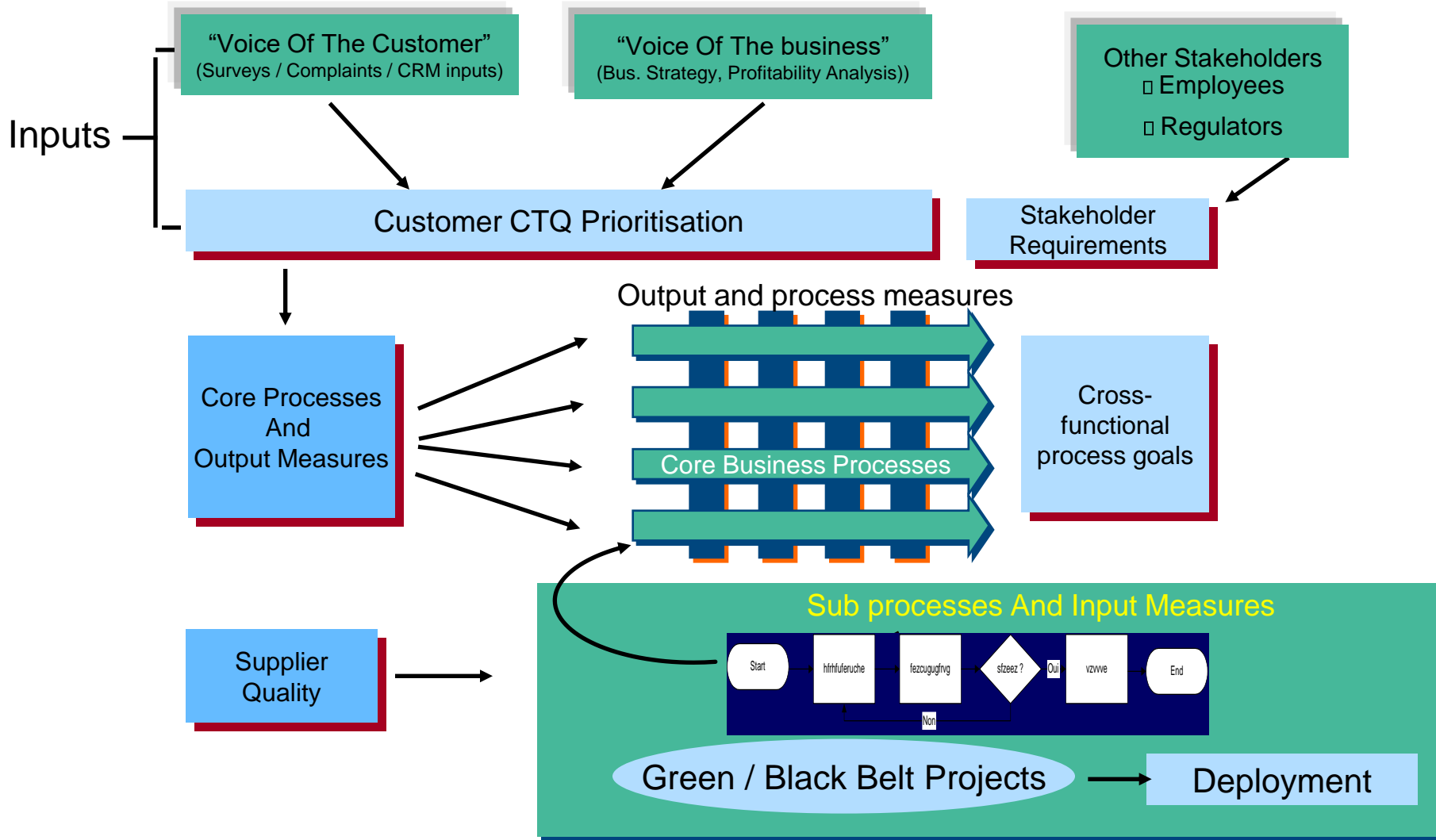
Typical primary Six-Sigma entry point:
Reduce variability



Transformation Roadmap



Project Selection

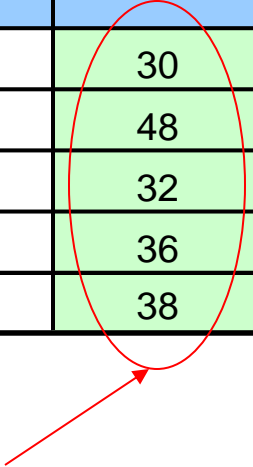


Transformation Opportunity Document

Business Case	Type of Project
<p><i>Why is the project worth doing?</i></p> <p><i>Why is it important to do it now?</i></p> <p><i>What are the consequences of NOT doing the project?</i></p> <p><i>How does it fit with the business initiatives and target?</i></p> <p><i>What is the business impact of the project?</i></p> <p><i>What must the team deliver to be successful?</i></p> <p><i>Required deliverable dates</i></p>	<p>(Tick whatever is appropriate)</p> <ul style="list-style-type: none"> <input type="checkbox"/> <i>Standardization</i> <input type="checkbox"/> <i>Value Addition</i> <input type="checkbox"/> <i>Revenue Generation</i> <input type="checkbox"/> <i>Cost Reduction and avoidance</i> <input type="checkbox"/> <i>Patient Satisfaction</i> <input type="checkbox"/> <i>Patient Safety</i> <input type="checkbox"/> <i>People Development</i> <hr/> <p>Contact Person</p> <p><i>Sponsor/Reviewer – Who is the owner of the project/process from Business?</i></p> <p><i>SME – Who are the subject matter experts on the process?</i></p>
Scope	
<p><i>Which are the processes team will focus on?</i></p>	<p><i>What is off limits (in-scope / out-of-scope)?</i></p>

Project Prioritization Matrix

Criteria	Return On Investment	Contribution to Strategic Business Objectives	Addresses Voice of the Customer	Change Management Effort	Overall Rating
Weighting	4	3	2	1	
Scoring Guidelines	> 50% = 5 50% – 20% = 3 < 20% = 1	High = 5 Medium = 3 Low = 1	Yes = 5 Some = 3 No = 1	Easy = 5 Moderate = 3 Hard = 1	
Project 1	3	5	1	1	30
Project 2	5	5	5	3	48
Project 3	5	1	3	3	32
Project 4	5	3	1	5	36
Project 5	3	5	5	1	38



Projects with highest scores addressed on a priority

$$O = C \times F$$

O : Opportunity
C : Condition
F : Favorability

Key Outcomes and Levers

$$Y_{\text{outputs}} = f(X_{\text{process}} \cdot X_{\text{inputs}})$$

Return on investment (\$ ROI)

Improved operational performance
(e.g. capacity, productivity)

Enhanced patient experience
(e.g. satisfaction)

Increased process transparency
(e.g. performance metrics)

Resources

- Engaged process owners / champions
- Fully committed project leaders
- Sufficient access to process experts & technical advice
- Developing process excellence skills across the organisation

Project management

- Clear alignment to desired strategic outcomes
- Establish early project wins to gain momentum
- Focus on improving operational performance to subsequently achieve financial or client experience outcomes

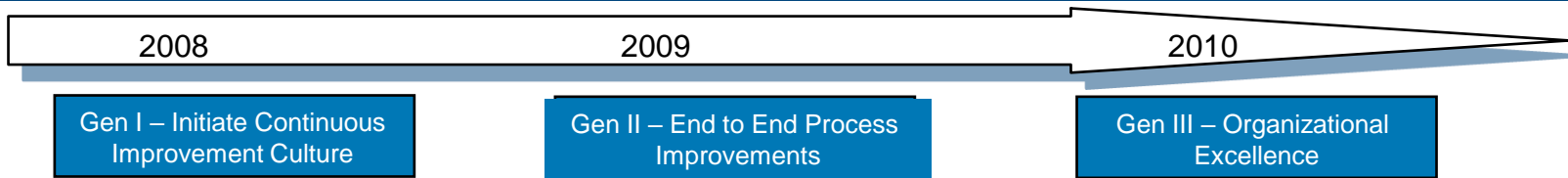
Decision making

- Data driven decisions & problem solving
- Ready access to empowered leadership
- Stakeholder 'buy-in' regarding key process decisions

Accountability

- Verifiable operational & financial results
- Clearly communicated project timelines
- Champions & process owners accountable for process improvement outcomes
- Measured sustainability of change

Example of 3 Years Plan : 2008 - 2010



Vision

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> ■ Establish process framework for critical processes ■ Seed the process improvement culture within Riyad Bank. ■ Lean Six Sigma as a basis for quick wins | <ul style="list-style-type: none"> ■ Six Sigma culture to be spread across all branches ■ Big cross functional projects leading to substantial positive impact on the profits of the bank | <ul style="list-style-type: none"> ■ Weaving innovation and re-engineering yielding breakthrough improvements ■ Lean Six Sigma as a 'way of doing business' ■ All critical Processes exceeding customer and business expectations |
|---|---|--|

Focus

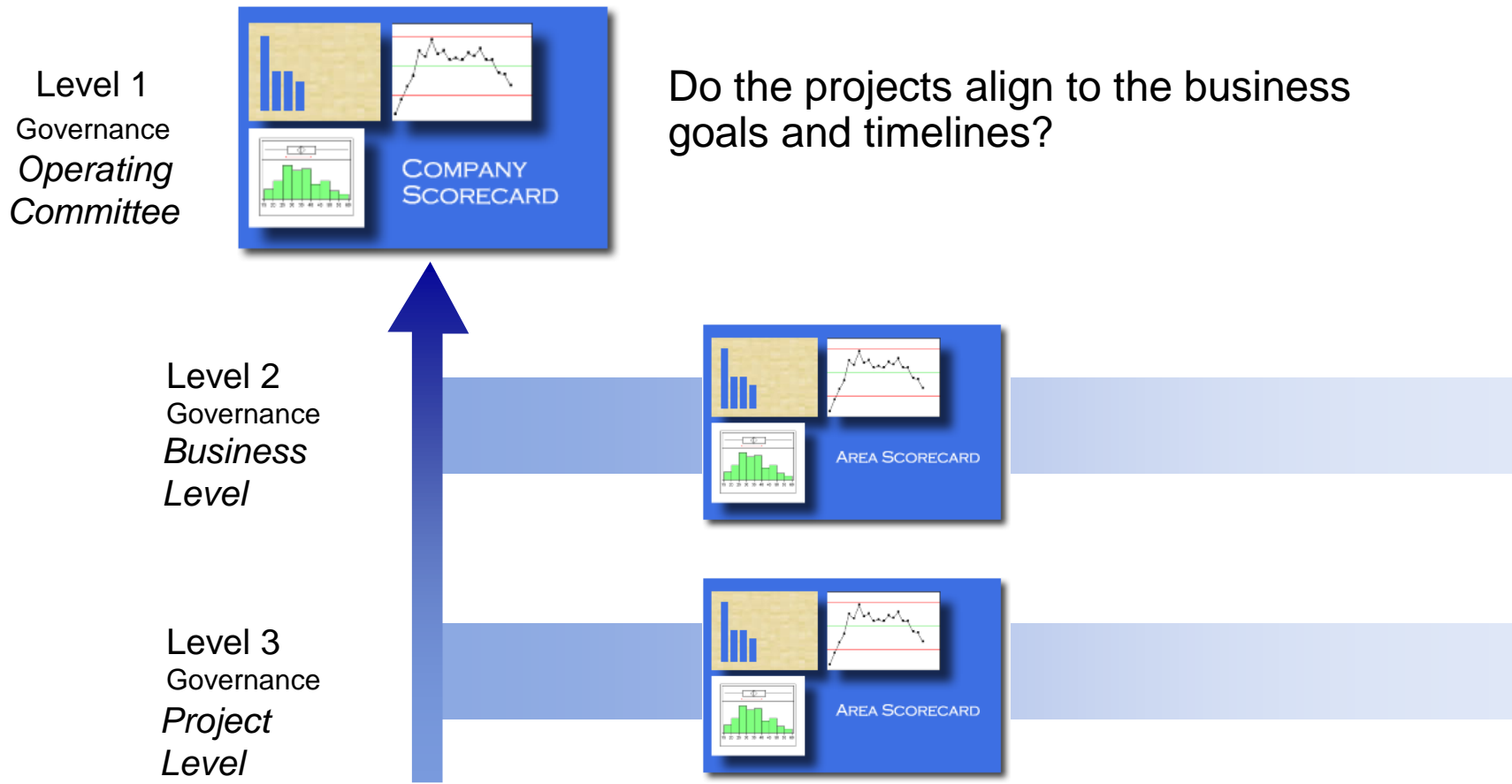
- | | | |
|---|---|---|
| <ul style="list-style-type: none"> ■ Lean Six Sigma Green Belt Training and awareness training (Yellow Belt) ■ Establish and measure key performance indices and initiate process mapping. ■ Project engagement with various divisions and Departments | <ul style="list-style-type: none"> ■ End to end process mapping of critical processes in various business areas,. ■ Project selection based on <ul style="list-style-type: none"> • Performance of critical processes • Pain areas ■ Project focused training | <ul style="list-style-type: none"> ■ Building resilience ■ Improvement projects driven by core process leaders ■ Designing the new processes using six sigma tools |
|---|---|---|

Measures

- | | | |
|---|---|---|
| <ul style="list-style-type: none"> ■ 30 fully trained Green Belts & 200 Yellow Belts ■ Deliver critical LSS infrastructure support in select product / process groups (e.g. Retail Banking, Consumer Finance, Operations etc.) ■ Benefits associated with initial six sigma improvement projects | <ul style="list-style-type: none"> ■ SAR XX m annualized benefits achieved ■ Fully trained 15Black Belts, 90 Green Belts and 1000 Yellow belts ■ KPI dashboards deployed across critical processes | <ul style="list-style-type: none"> ■ SAR XX m annualized benefits achieved ■ Breakthrough results from end to end process analysis leading to breakthrough improvement. ■ Completely redesigning the processes to achieve maximum utilization of resources and facilities. ■ Performance dashboards deployed across 100% of core transaction processes ■ Every employee trained as Yellow Belt |
|---|---|---|

Process Governance

3 – Level Governance Structure



Maintaining Momentum and Energy Levels

- Quick wins through process mapping and automation
- Companywide involvement
- Efficient project governance and reviews
- Project duration under control
- Roadmap created for at least next 3 years
- Efficient training programs and enthusiastic trainers
- Certifications and importance attached to them
- Six Sigma and Best Practices Forum as periodic events
- Publicizing Success
- Updating Senior Management on the results of efficiency programs
- Ensuring that adequate resources are available
- Measuring Benefits
- Statistical applications to process improvement programs

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Chapter 3

Project Selection using Balanced Score Card or Dashboards

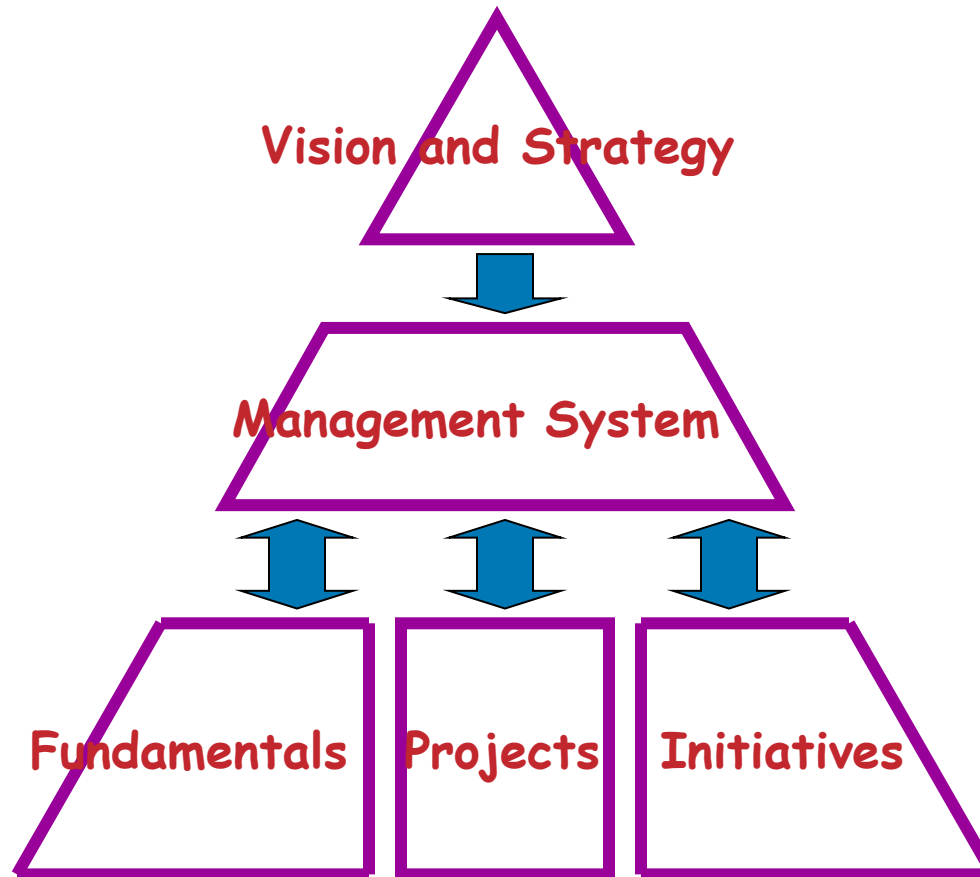
Introduction to Balanced Scorecard

- **The balanced scorecard is a *management system* (not only a measurement system).**
- **It enables organizations to clarify their vision and strategy and translate them into action.**
- **It provides feedback around both the internal business processes and external outcomes in order to continuously improve strategic performance and results.**
- **Fully deployed, the balanced scorecard transforms strategic planning from an academic exercise into the nerve center of an enterprise.**

Introduction to Balanced Scorecard

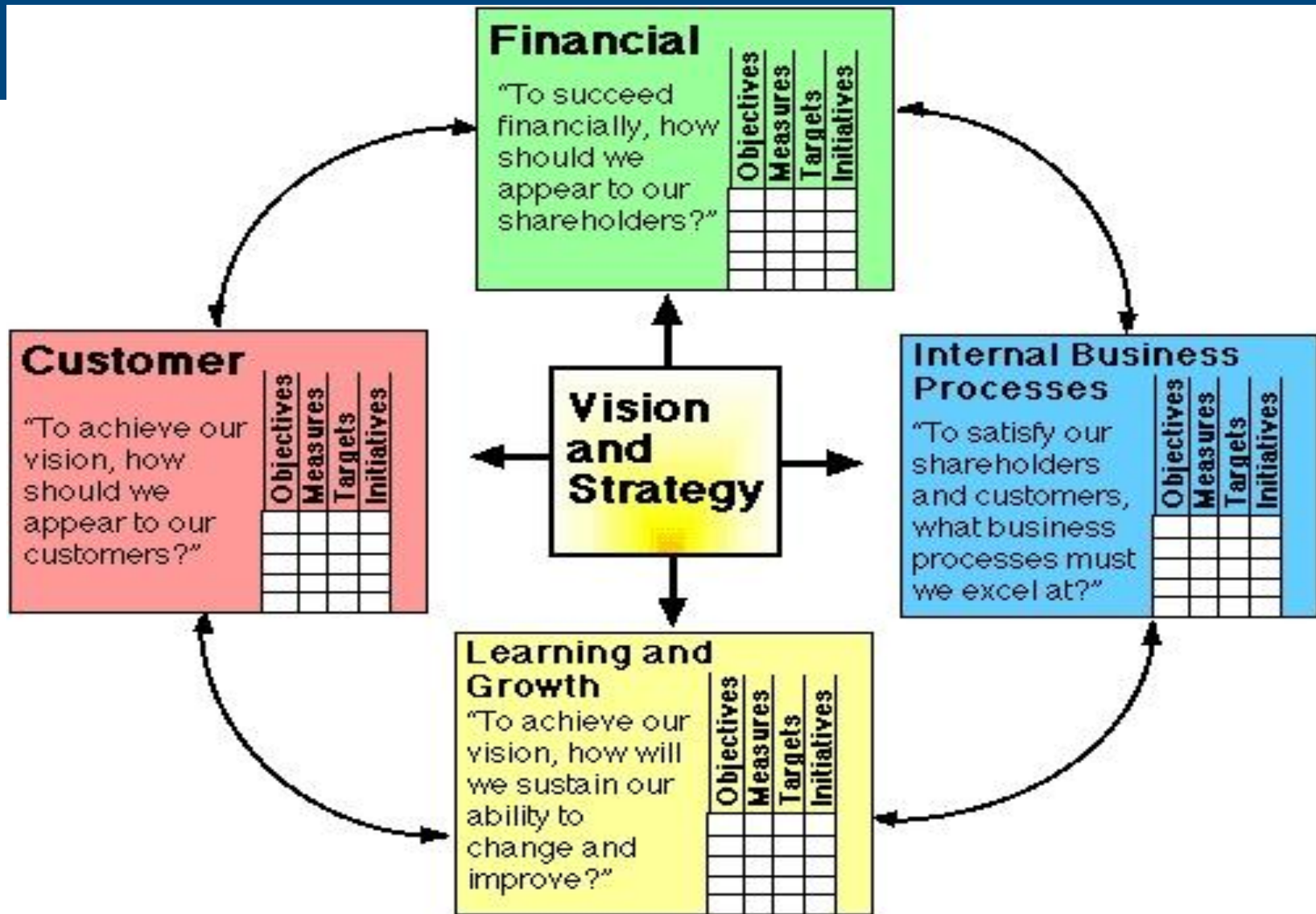
- A new approach to strategic management was developed in the early 1990's by Drs. Robert Kaplan (Harvard Business School) and David Norton.
- They named this system the 'balanced scorecard'.
- The balanced scorecard approach provides a clear prescription as to what companies should measure in order to 'balance' the financial perspective.

The importance of a management system



What is Balanced Scorecard?

- The 'Balanced Scorecard' solution - Kaplan & Norton
 - A set of measures based on
 - Finance
 - Customer
 - Internal processes
 - Learning and growth
 - Linked to vision and strategy
 - 'Balances' short and long term needs
 - Builds 'leading' and 'lagging' indicators



Project Selection

Underperforming KPIs can be selected as CTQs in Green Belt and Black Belt projects

All projects should be linked to strategic business objectives

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Chapter 4: Teamwork and Team Skills

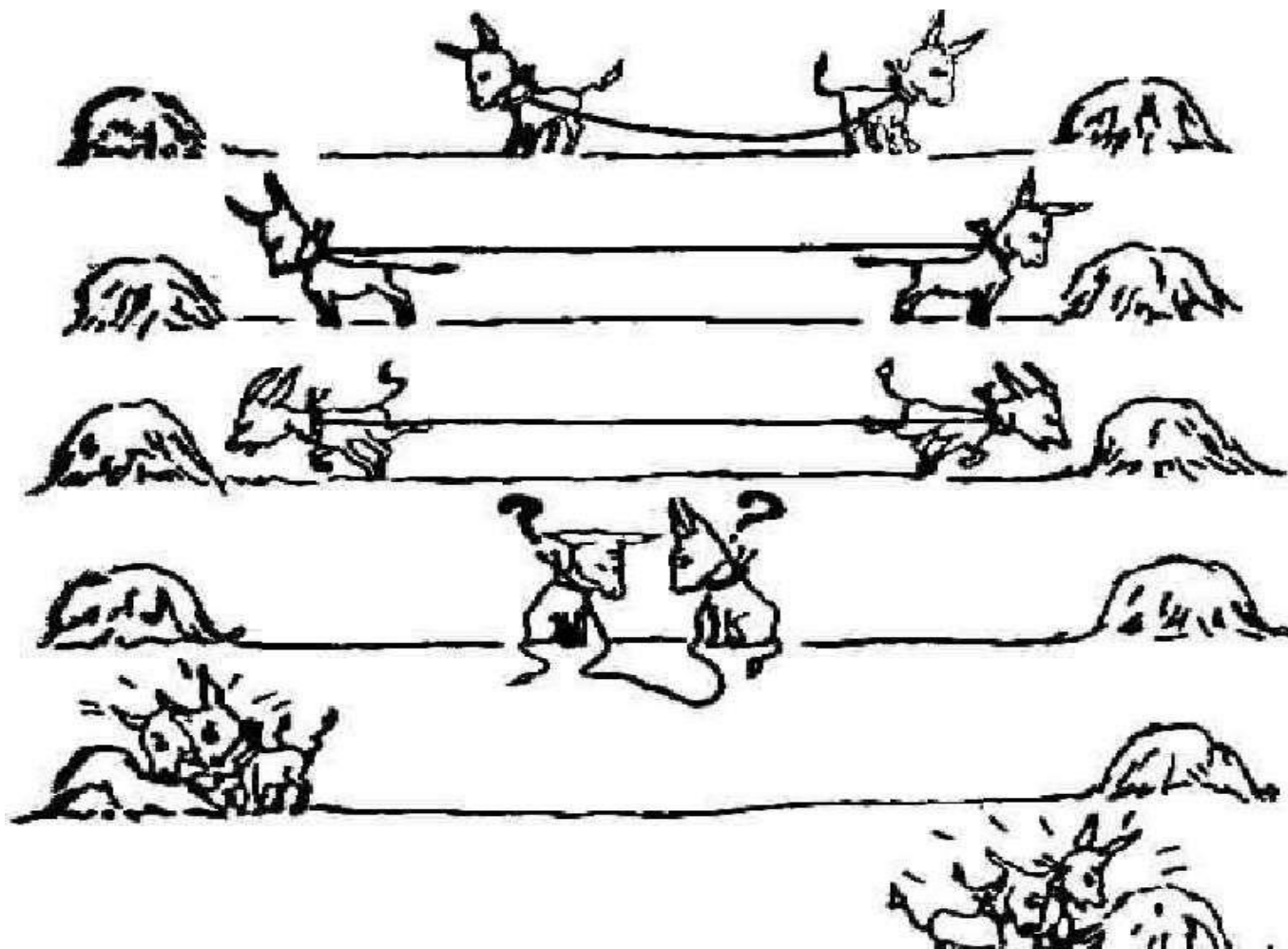
Team

We define a team as “A group of people, who have a commitment to produce a result”.

Team Work

“The ability to cooperate and communicate effectively with others to achieve a common goal.”

Importance of Team Work



Team

T

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M

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Team Work

When teams are working well it can be very enjoyable and bonding experience.

Most people enjoy working with others. Man is after all a social animal!

Benefits of Team Work

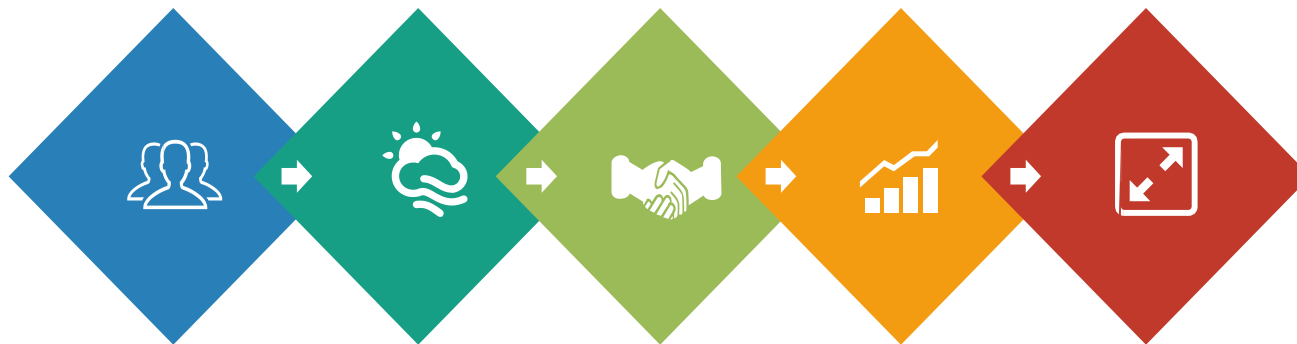
- Quick Solution.
- Improved productivity.
- Distribution of work load.
- Diversity of Ideas.
- Better decision.
- Motivation.
- Learning.

Stages on Team Development

1. Forming
2. Storming
3. Norming
4. Performing
5. Adjourning

Stages on Team Development

we will be learning about the five stages of team development; forming, storming, norming performing and adjourning.



Forming

The forming stage occurs when team members first come together as a team.

Storming

During the storming stage, teams discover teamwork is more difficult than they expected.

Norming

The norming stage begins as the team moves beyond the storming stage and begins to function as a team.

Performing

When a team reaches the performing stage it is functioning as a high performance team.

Adjourning

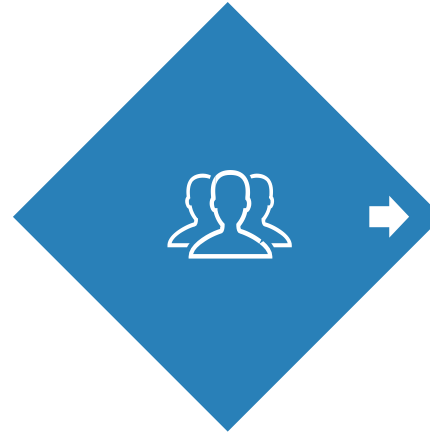
Breaking up the team when the required task is complete.

Tuckman's stages of team development

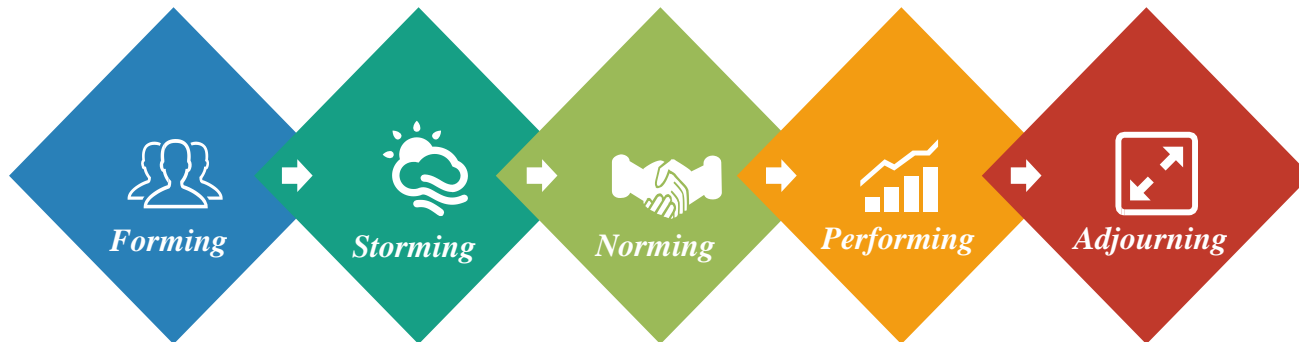
Team building - Forming

- Strong dependence on leader
- Simple ideas
- Avoidance of controversy
- Avoidance of serious topics
- Minimum feedback

Leaders Direct



The forming stage occurs when team members first come together as a team



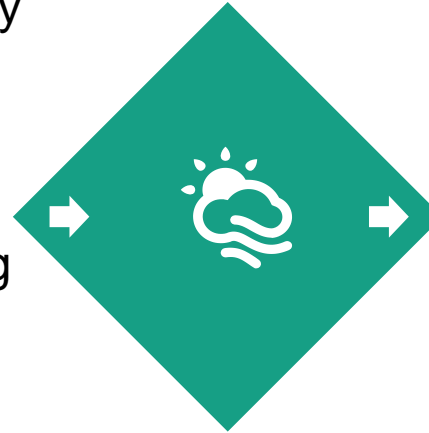
Team building - Forming

- First stage in team building
- Involves the transition from individual to team
- Individuals get acquainted
- Members generally have positive expectations
- Little work is actually accomplished
- Project manager must provide direction and structure
- Individuals do a lot of questioning
 - What's is our purpose?
 - What are other team members?
 - What are they like?

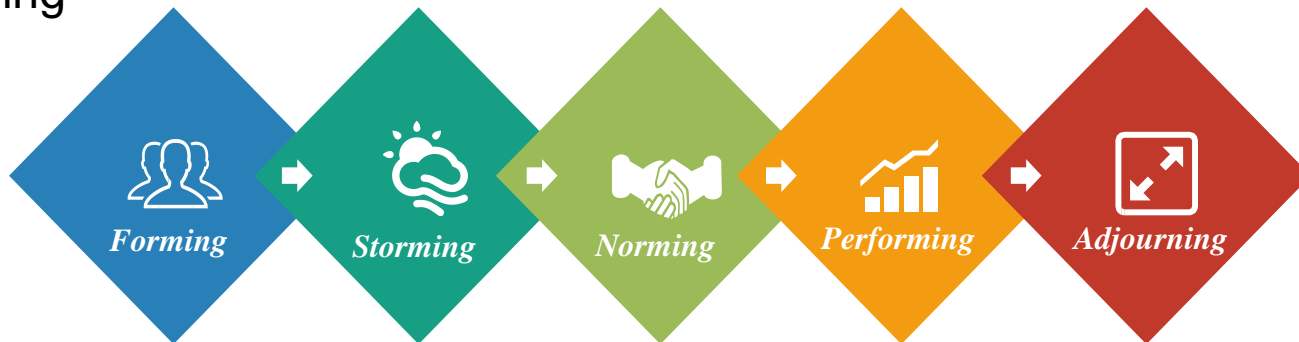
Team building - Storming

- Strongly expressed views
- Challenging others' ideas
- Challenging leadership, authority and position
- Withdrawal by some team members
- Lack of collaboration, competing for control
- High level of reacting or defending

Leaders Coach



During the storming stage, teams discover teamwork is more difficult than they expected.



Team building - Storming

- Second stage in team building
- Members start to work on their assigned tasks
- Members begin to test the limits and flexibility of the project manager
- Conflict and tension increase
- Motivation and morale are low
- Members express their individuality not team allegiance
- Project managers should:
 - be somewhat directive
 - not become defensive or take issues personally
 - provide an understanding and supportive environment

Team building - Norming

- Active listening
- Shared leadership
- Methodical systematic ways of working
- Readiness to change preconceived views
- Receptiveness to others' ideas
- Active participation by all
- Conflicts seen as mutual problems
- Open exchange of ideas

Leaders Facilitate



The norming stage begins as the team moves beyond the storming stage and begins to function as a team.



Team building - Norming

- Third stage of team building
- Relationships become settled
- Interpersonal conflicts have been resolved
- Cohesion begins to develop
- Project manager minimizes directive ness
- Work performance accelerates and productivity increases

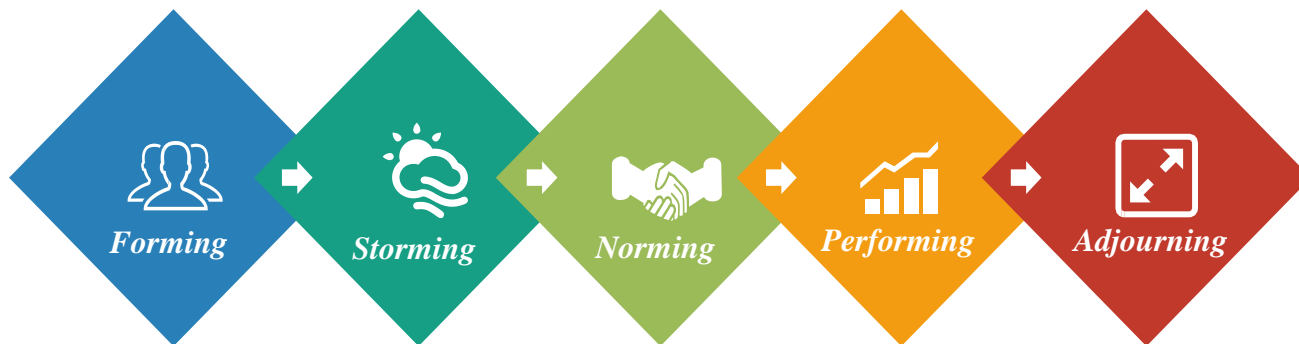
Team building - Performing

- High creativity
- Openness and trust
- Strong relationships
- High achievement

Leaders Delegate



When a team reaches the performing stage it is functioning as a high performance team.



Team building - Performing

- Fourth stage of team building
- Team is highly committed and eager to achieve the project objective
- Level of work performance is high
- Communication is open. Members collaborate and help each other
- The project manager:
 - fully delegates responsibility and authority
 - concentrates on project performance
 - acts as a mentor

Team building - Adjourning

- Adjourning, is the break-up of the group, hopefully when their task is completed successfully, their purpose fulfilled.
- Recognition of and sensitivity to people's vulnerabilities is helpful

Leader reassure and communicate

When Breaking up the team when the required task is complete.



Team building - Adjourning

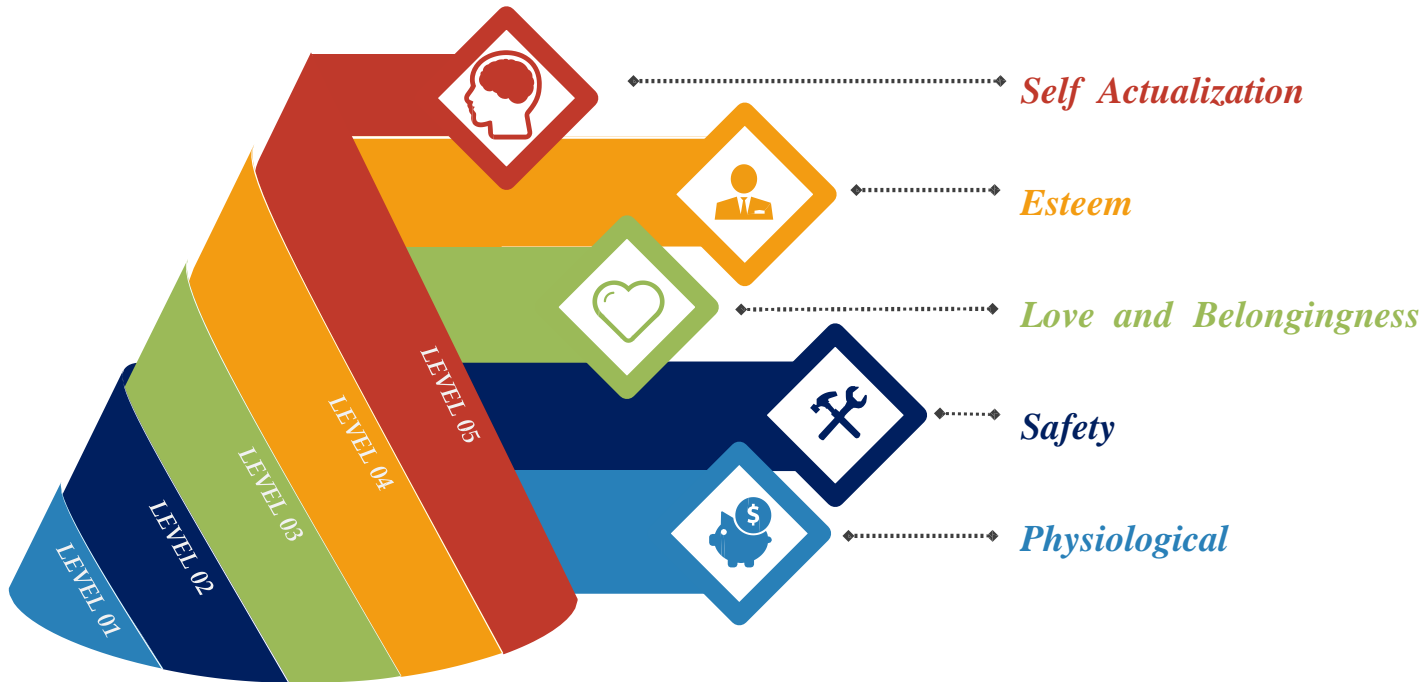
During this stage :

- It is important to achieve closure for the group on a positive note.
- It is therefore important to recognize the group members for their accomplishments and celebrate the group's overall success.

Motivation

- Abraham Maslow's Hierarchy
- Herzberg's Two Factor Theory
- Douglas McGregor – Theory X and Y

Abraham Maslow's Hierarchy



Abraham Maslow's Hierarchy

- Abraham Maslow was a philosopher and he provided this theory of motivation and this consists of five levels and these five levels are physiological at the bottom, then next is the safety needs, love and belongingness, esteem and self actualation.
- Physiological needs are basically the food, water and shelter; all the basic things which we need to survive.
- What Abraham Maslow's hierarchy tells us is that you need to meet the human need from bottom upwards.
- So, the first thing what you need to do is you need to make sure that people have food, water, shelter. Those are the basic needs. Those are the needs which need to be fulfilled to motivate a person.

Abraham Maslow's Hierarchy

- Let's say if one of your worker doesn't have food to eat, it doesn't matter how much you appreciate his work or how much you give a sense of belongingness to that person because that person doesn't have food, water and shelter.
- These are the basic needs, to meet the needs of own being, you need to first start from the bottom and the bottom most need is the physiological need.

Abraham Maslow's Hierarchy

- Once the physiological needs are met, then the person looks for the next level. And that next level is safety.
- So, the safety of the job, the personal safety, the medical safety, all those things become important when the physiological needs have been met, this is the second level of need.

Abraham Maslow's Hierarchy

- The next level of need is love and the belongingness.
- Once the safety is there, once the basic food, water and no shelter is there, then the person looks for love and belongingness because humans are social. So, they want love and belongingness.
- They want to be in a group where they can share their feeling, where they can share their love and affection for each other. So, that's the third level.
- So, once the safety needs are met, then the person looks for love and belongingness.

Abraham Maslow's Hierarchy

- So, the next level is esteem, which basically means the prestige and the feeling of accomplishment.
- So, if a person has done good, then the person need to be appreciated. Person need to feel that that person has achieved something.
- So, that comes at the fourth level and the fifth level is the highest level, which is self actualization,

Abraham Maslow's Hierarchy

- The fifth level is the highest level, which is self actualization, where the person achieves one's full potential, including the creative activities.
- So, this is the level in which the human needs need to be met.
- So, as a manager, you need to see that where your people are where your employees are at and then, you need to look at the next level because that's what will motivate your employees.
- So, this theory is not based on hard fact and data but this is based on the basic concept which are even applicable today, even though this theory was developed way back.

Herzberg's Two Factor Theory



Herzberg's Two Factor Theory

- Herzberg's Two-Factor theory, and this theory is also called as Herzberg's motivation hygiene theory or dual factor theory.
- So, what this tells you is that there are two types of factors. One type of factors which create job satisfaction while there is another set of factors which causes dissatisfaction, and both of these factors work independently.
- If you see, there are two arrows. One is the motivational factors or the motivators and the second is the hygiene factors.

Herzberg's Two Factor Theory

- Let's talk about the motivators first.
- So, motivators are things such as challenging work or recognition of one's achievement or opportunity to do something big or something meaningful.
- These are motivational factors or motivators.
- These give the positive satisfaction to your employees.
- So now, if you look at other types of factors, which are hygiene factors.
- The examples of hygiene factors are let's say the job security or the monthly salary or the working conditions. So, these are hygiene factors.

Herzberg's Two Factor Theory

- Now, these factors do not give a positive satisfaction.
- But the absence of these lead to the negative satisfaction or demotivate people. So, having hygiene factors does not motivate but not having these hygiene factors demotivate people.
- So, these are the two types of factors that you need to see when you are thinking about motivating your team members.
- Now, looking at these two factors; the motivators and hygiene factors, there could be four scenarios.

Herzberg's Two Factor Theory

- The first scenario is when you have high hygiene factors and high motivating factors.
- So, out of motivators and hygiene, let's take one simple example.
- In motivators, let's talk about the recognition and the challenging work. That's the motivator.
- On the other hand, in Hygiene Factor, let's talk about pay salary and the perks; those are hygiene factors.
- Now, when a company has high motivators and high hygiene factors, that means there is a good pay, there is good parks.

Herzberg's Two Factor Theory

- And on the other side, there is a challenging work and recognition as well. So, that is the best combination.
- On the other hand, let's say if you have a company which has high hygiene factors. So, high hygiene factor means, OK, there's a good salary, there's good park, but there are low motivators.
- So, there is no recognition. There is no meaningful work. So, what this leads to is people doing the job for the sake of the salary.
- So, there's no motivation to do things, but people do things just for the sake of salary.

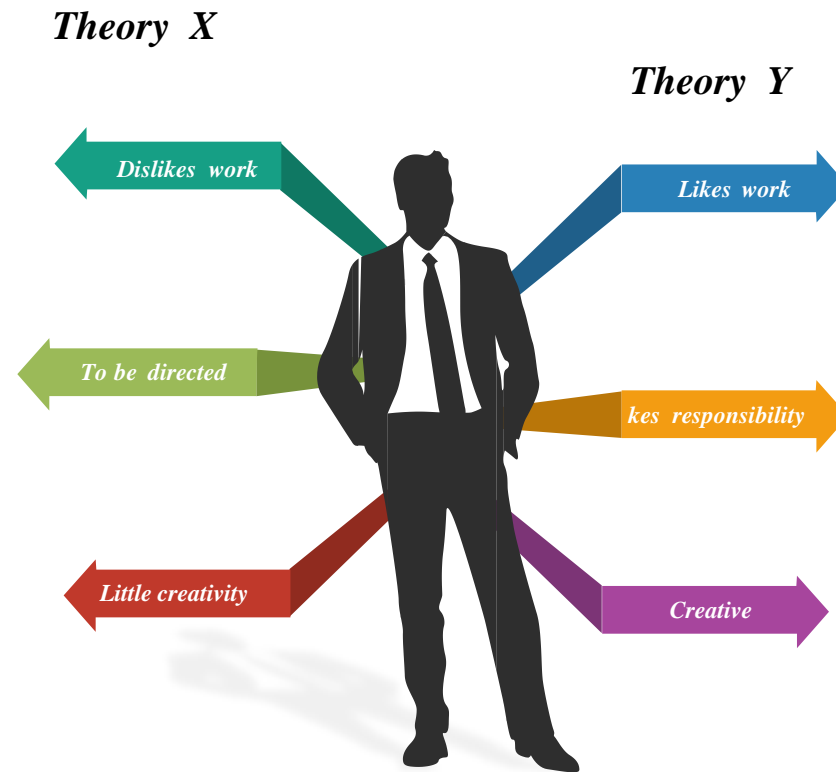
Herzberg's Two Factor Theory

- Other combination of these two could be low hygiene and high motivators. So, low hygiene means, let's take the same example.
- The salary is low, the perks are low, but their motivation is high. So, what will happen in this case that people will have high motivation to do things, but there will always be complaining about the lack of salary or a lack of perks and so on.
- So, you will not get the level of performance as you would get in case of high motivators and high hygiene factors.

Herzberg's Two Factor Theory

- And the last case would be low hygiene and low motivators.
- So, that means there is low salary, low perks and on the other side, the job is also not exciting. It's not challenging. There is no recognition.
- So, that's the worst case scenario which could happen.
- So, as a manager of quality, you might want to look and see that what are the factors, which are the motivating factors and what are the factors which are hygiene factors and keep a clear understanding that hygiene factors do not motivate people; only the absence of these hygiene factors demotivate people.

Douglas McGregor – Theory X and Y



Douglas McGregor – Theory X and Y

- This is about managers, how managers look at their employees.
- So, when we talk of theory X, the manager who believes theory X believes that the typical workers do not want to do work and they assume that the workers have low or basically no ambition and they don't want to take any responsibility.
- So, this is what the manager who believes in theory X believes. So basically, theory X manager believes that the people who are working under him or her are not much intelligent, they are lazier and they're only working to get the salary.

Douglas McGregor – Theory X and Y

- And that's what the manager who believe in theory X believes in.
- So, what they believe is that they need to have a close supervision of their workers, they need to monitor them on a regular basis, and then, they need to use a hands on approach when they deal with their workers or their subordinates.
- So, this is the belief of those managers who believe in theory X.

Douglas McGregor – Theory X and Y

- Then, there are another set of managers who believe in theory Y. So, these managers who believe in theory Y believe that people are internally motivated; all the employees are internally motivated, they enjoy the work and they want to do a good job.
- That's the belief of managers who believe in theory Y.
- And these managers believe that people are their biggest asset and they believe that people do not need close supervision.
- So, let's say if I believe theory Y, what I will believe is that people who are working under me, they don't need to be closely supervised.

Douglas McGregor – Theory X and Y

- They just need to be given a goal and then, they can work it out. So, that's what theory Y managers believe in.
- But even in that case also, the role of manager is important because management might be giving approval for doing all those actions.
- So, people still need to take manager's approval, but then they are self-motivated to do a good job.
- So, that's what Theory X and Theory Y is about.
- This is about the mindset of the managers; how managers look at their employees.

Brainstorming

WHAT IS BRAINSTORMING?

Idea
Generation



Idea 01



Idea 02



Pre-requisites of Brainstorming

- Purpose of Brainstorming
- Participants (From the process / not from the process)
- Facilitator
- Stationery
- Selection of tool of brainstorming
- Meeting room
- Facilities
- Communication to participants about time, venue, topic in advance



Rules of Brainstorming

- Equal opportunity to everyone to participate
- Capture all the ideas (Document)
- Leave your designation and ego along with your shoes outside meeting room
- Non threatening environment to be created
- Ensure that there are no disturbances
- Focus on the topic (Create parking lot)
- Fantasize freely (Do not put breaks on your thoughts)
- Watch your time!
- Defer evaluation (Do not discuss ideas)
- Generate Quantity, do not worry about Quality

Generating Solution Ideas

- Review what you know about the process and the verified cause
- Brainstorm solution ideas; use creativity techniques
- Combine ideas into solutions



Brainwriting 6-3-5

635 Brainwriting



6

People



3

Ideas



5

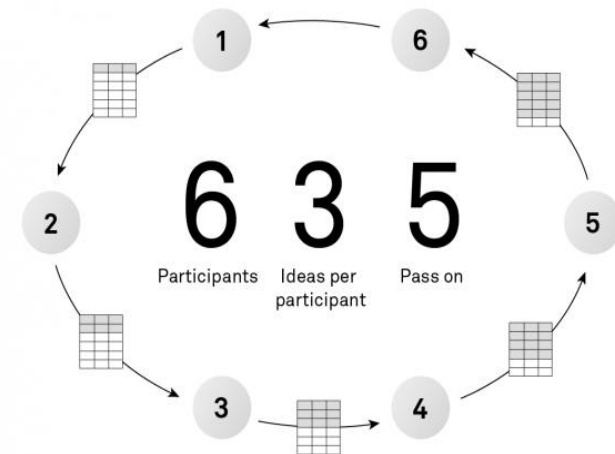
Minutes

Repeat 6 Times

108 Ideas in **30** Minutes

Brainwriting 6-3-5

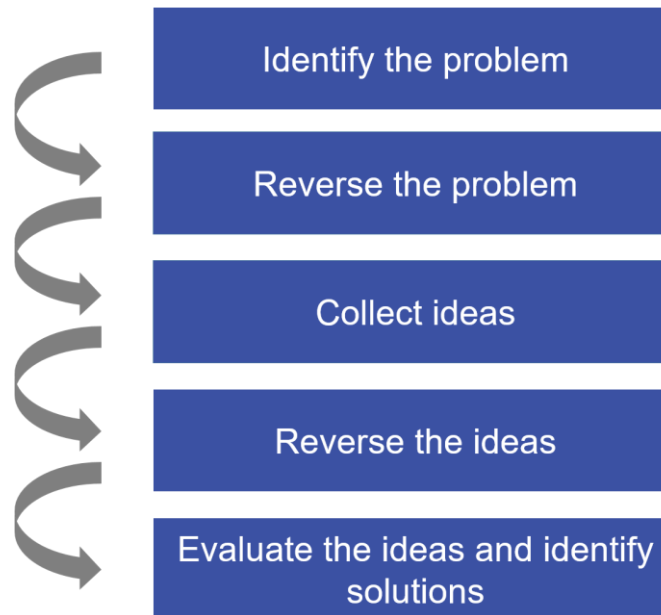
- Team members brainstorm ideas on a written form:
 - Take 5 minutes to write down three solution ideas on the first row of your form
 - Pass your form to the right
 - On the form you have just received from your team member, add another three ideas on the next row
 - Add ideas by:
 - Enhancing an idea already on the sheet
 - Adding a variation of an idea on the sheet
 - Adding a completely new idea
 - Repeat for as many rounds as you have team members



Round Robin and Anti Solution

Anti Solution

- Team brainstorms on how to increase the problem rather than solving it.
- The brainstormed ideas are reversed to get the solution.

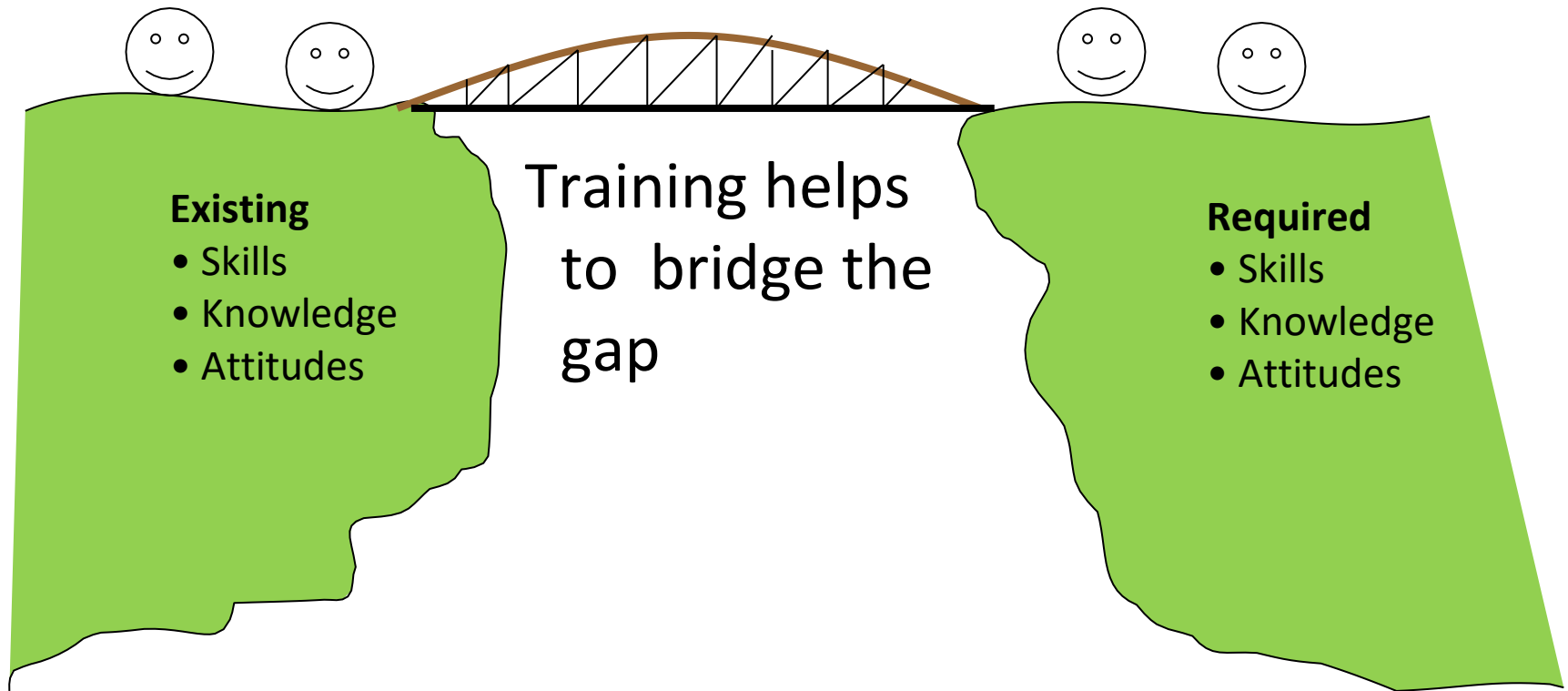


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Chapter 5: Training

Purpose of Training

Training ?



Introduction

What Is Training ?

Training is a structured process that provides participants with the knowledge and skills to perform job tasks, and the desire to use them.

A planned process to modify attitude, knowledge or skill behaviour through learning experiences to achieve effective performance in an activity or range of activities.

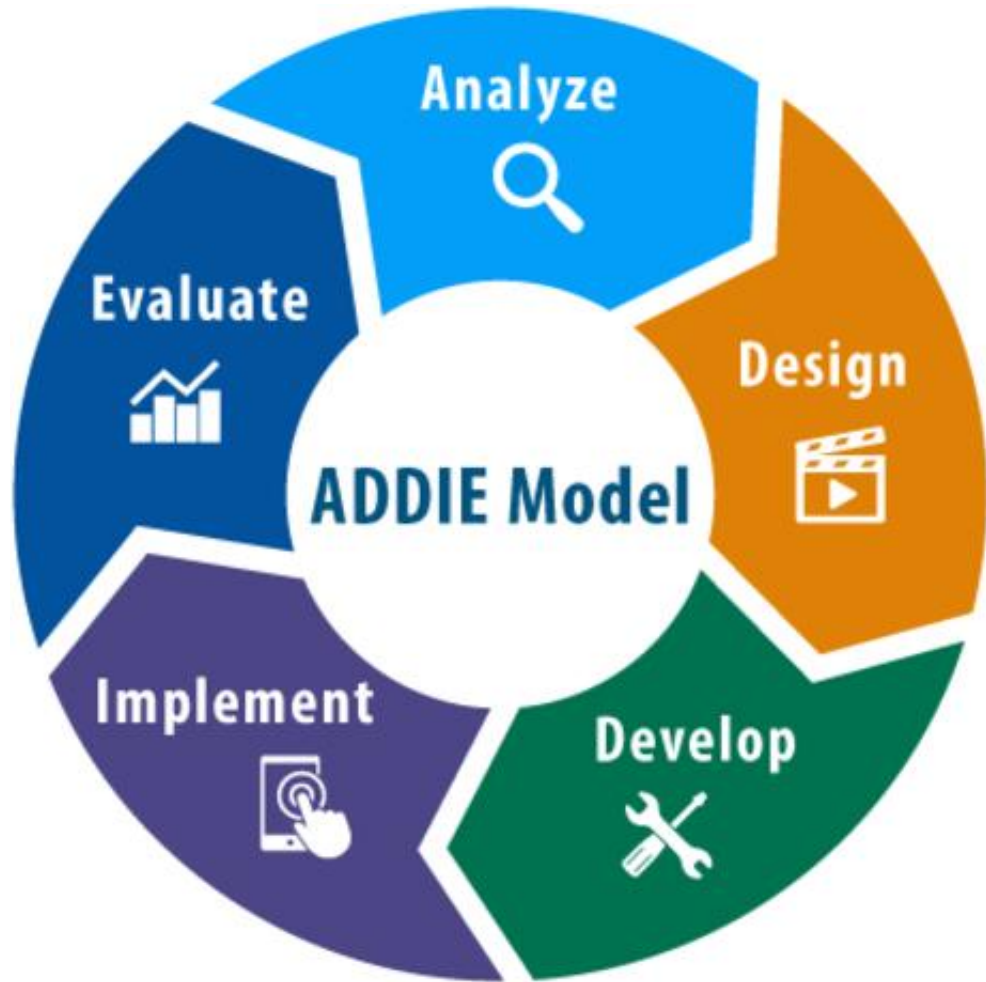
Purpose of Training

- To prepare the employee, both new & old to meet the present as well as the changing requirements of the job & the organization.
- To develop the potentialities of the people for the next level job.
- To ensure smooth & efficient working of a department.
- To ensure economical output of required quality.
- To build up a second line of competent officers & prepare them to occupy more responsible position.
- To prevent obsolescence.

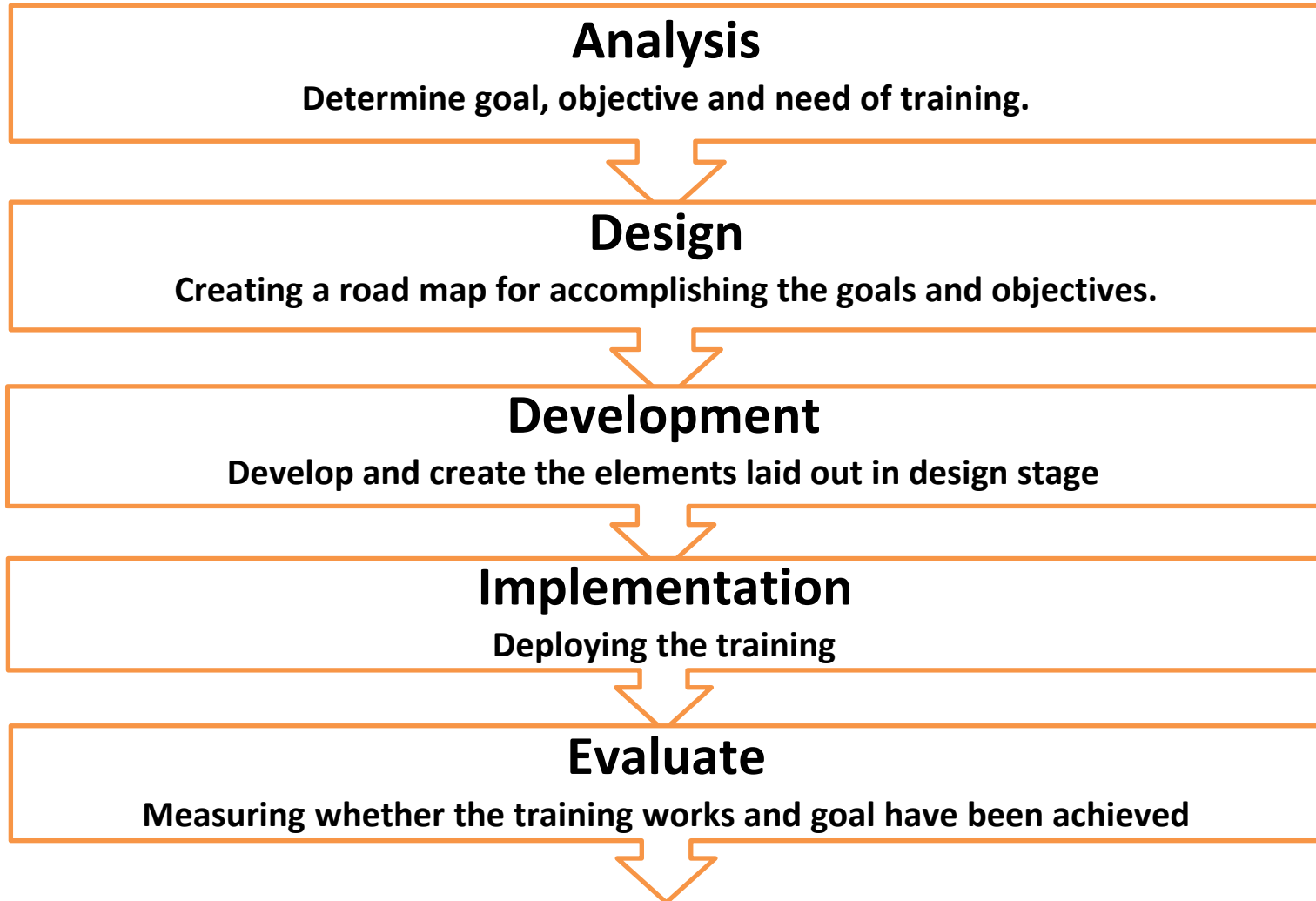
Training Process : ADDIE Model

ADDIE MODEL

https://youtu.be/BCJY_r7NJc0



Training Process : ADDIE Model



Training Process : ADDIE Model

Analysis

Determine goal, objective and need of training.

- Observing and Listening
- Surveys
- Interviews
- Tests
- Reviewing Company Records
- Customer Requirement
- Change in Legislations/laws etc

Training Process : ADDIE Model

Design

Creating a road map for accomplishing the goals and objectives.



- Learning objectives
- Course outline - Develop and sequence major topics
- Method of Teaching –Classroom, On the job/Experience/Role Playing etc.
- Learning/Teaching aids – Board/Laptop /OHP PowerPoint /Flip charts/TV & video (CD/DVDs)/ Pictures/Skill Practice/Games
- Target group – Level/Size /Insiders/ outsiders/ Diversity.
- Venue – Size/Location/Comfort/Time etc.

Training Process : ADDIE Model

Development

Develop and create the elements laid out in design stage



- Create the presentation of the course content
- Performing review
- Improve the presentation.
- Run a pilot session/Practice it.

Training Process : ADDIE Model

Implementation

Deploying the training

- Launch the training
- Deliver materials to the trainees
- Conduct training accordingly

Training Process : ADDIE Model

Evaluate

Measuring whether the training works and goal have been achieved

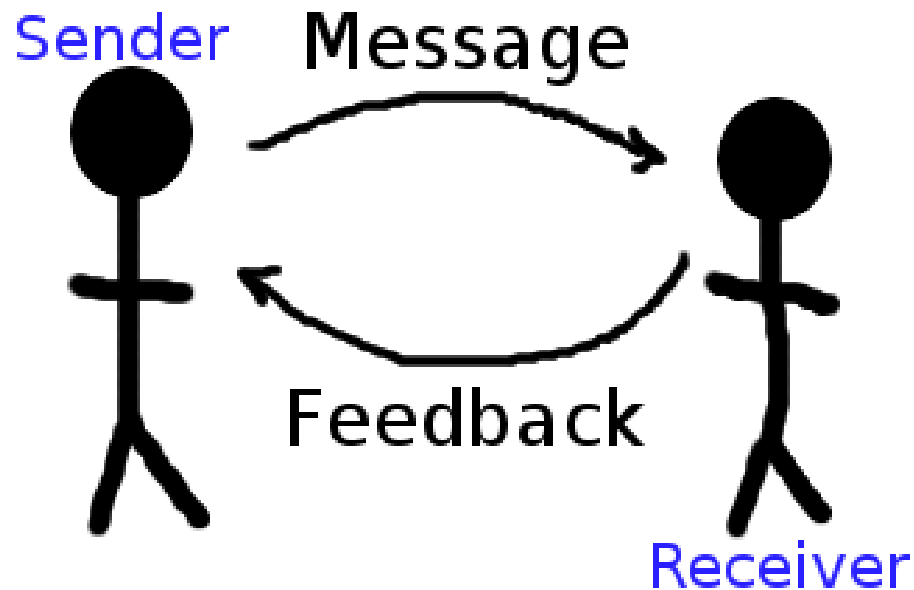


There are four standard levels of evaluation

- Trainee reactions to the training
- Trainee learning
- Trainee on-the-job behavioral changes
- Results of the training for the organization

[The ADDIE Model of Instructional Design - YouTube](#)

Effective Communication



A two way process of exchanging the ideas, information or transmitting of **verbal** and **non verbal** messages.

Benefits of training

1. Increased productivity
2. Heightened morale
3. Reduced supervision
4. Reduced accidents
5. Increased organizational stability



Resistance to training

Why do employees resist training?

- Normally people experience difficulties in learning new skills & knowledge. Hence, they resist training.
- The employees feel that management will entrust more work or new kinds of work which would require additional skills & knowledge. Hence, employees resist training.
- Training programme & sessions disturbs the employees from performing the routine duties & tasks.
- They are expected to learn more difficult activities & unlearn already practiced skills.
- They loose their job authority & are expected to learn like participants during their training programme

Anexas Consultancy Services

Chapter 6 : Principles of Adult Learning

Principles of Adult Training

Adult learning (andragogy) is the practice of educating adults to develop their knowledge or skills

- Adults bring valid experience to the learning situation
- Adults have immediate needs and objectives
- Adults need evidence of usefulness.
- Adults need to understand how information will impact the current, or their future situation.
- Adults can identify their own learning needs.
- Adults are responsible for their own learning
- Adults appreciate an informal, non-threatening learning environment.

Principles of Adult Training

- Adults may have negative experiences related to goals/situations.
- Adults must have a clear understanding of what is expected of them.
- Adults retain information when practice and application is available shortly after information is acquired.
- Adults work best at their own pace.
- Adults learn through active involvement i.e. discussion/experience
- Adults maintain interest and retain information better when learning with a variety of teaching/learning methods.

Goals

- What's an adult learner?
- Learning considerations for adult learners
- Principles of Adult Learning
- Diverse learning styles.
- Use NLP techniques to identify learner styles
- Options to actively engage and energize learners
- Appealing to different learning styles

What's an Adult Learner ?

WHO ARE TODAY'S ADULT LEARNERS?

90/20/8 Rule

Adults can listen for

- understanding for 90 minutes
- retention for 20 minutes and
- need to get involved every 8 minutes

The infographic features a central figure of a person in a suit pointing to a large screen. The screen displays a central graduation cap icon connected by lines to various icons representing learning activities: a person with a magnifying glass, a person at a desk, a person on a bicycle, and a person at a computer. The background is teal with a grid pattern.

Profile of adult learners

PROFILE OF ADULT LEARNERS

Adults Bring

- Prior experience and knowledge to the classroom
- Preferences and prejudices that may need to be overcome

Adults Expect To

- Use the concepts they learn immediately
- Be respected in the classroom

Adults Enjoy

- Solving problems
- Active learning
- Small group exercises
- Moving around the room

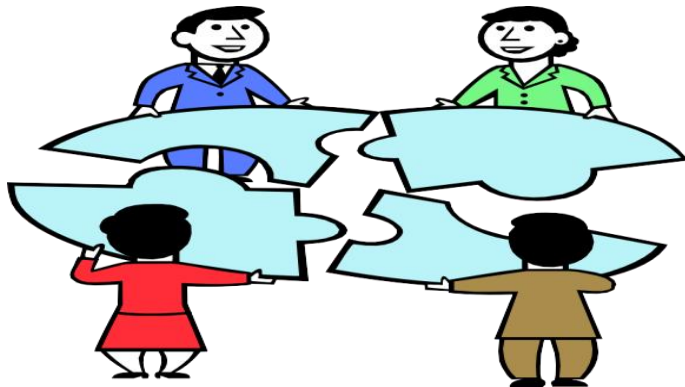
Adults Need To

- Know why a concept is important
- Feel like an active part of the learning process
- Learn at their own speed
- Receive feedback and constructive criticism

Principles of Adult Training

Differences between Adults and Children as Learners

- Self-Concept Differences
- Time Perspective Differences
- Accumulated Experience Differences



Learning considerations for adult learners

- **Self-direction**

Adults feel the need to take responsibility for their lives and decisions and this is why it's important for them to have control over their **learning**. Therefore, self-assessment, a peer relationship with the instructor, multiple options and initial, yet subtle support are all imperative.

- **Practical and results-oriented**

Adult learners are usually practical, resent theory, need information that can be immediately applicable to their professional needs, and generally prefer practical knowledge that will improve their skills, facilitate their work and boost their confidence. This is why it's important to create a course that will cover their individual needs and have a more utilitarian content.

Learning considerations for adult learners

- **Less open-minded** And therefore more resistant to change. Maturity and profound life experiences usually lead to rigidity, which is the enemy of learning. Thus, **instructional designers** need to provide the “why” behind the change, new concepts that can be linked to already established ones, and promote the need to explore.
- **Slower learning, yet more integrative knowledge**
Aging does affect learning. **Adults** tend to **learn** less rapidly with age. However, the depth of **learning tends** to increase over time, navigating knowledge and skills to unprecedented personal levels.

Learning considerations for adult learners

Use personal experience as a resource

Adults have lived longer, seen and done more, have the tendency to link their past experiences to anything new and validate new concepts based on prior learning. This is why it's crucial to form a class with **adults** that have similar life experience levels, encourage discussion and sharing, and generally create a learning community consisting of people who can profoundly interact.

Principles of Adult Training

Adult Learning Principles

- Keep learners actively involved.
- Relate learning to learner's goals.
- Let learners assess own progress.
- Allow debate and challenge of ideas.
- Focus on job-related problems.
- Emphasize learning applications.
- Relate learning to learners' past experiences.
- Encourage learners to be resources to each other.
- Listen to and respect the opinions of learners.
- Treat learners like adults.

Principles of Adult Training

Knowle's Principles of Adult Learning

– Practicality

Activities should be practical and “hands-on”. Experience (including mistakes) provides the basis for the learning activities.

– Relevance

Adult learners need to know “what’s in it for me?”

– Past Experience

Adult learners (as well as the instructor) should tap into the experiences of other learners.

– Task-oriented

Adult learning is problem-centered rather than content-oriented. Adult learners need clear objectives.

Diverse learning styles

Information enters your brain three main ways: sight, hearing and touch, which one you use the most is called your Learning Style

- **Neil Fleming's VAK/VARK model**
 - Visual Learners learn by sight
 - Auditory Learners learn by hearing
 - Read/Write Learn by read and write
 - Tactile Learners (kinesthetic) learn by touch



Diverse learning styles

Visual Learners

- Prefer to see information
 - pictures, diagrams, cartoons, demonstrations
- Picture words and concepts they hear as images
- Easily distracted in lecture with no visual aids
- Overwhelmed with intense visuals accompanied by lecture
- Benefit from using charts, maps, notes, and flash cards when studying



Diverse learning styles

Auditory Learners

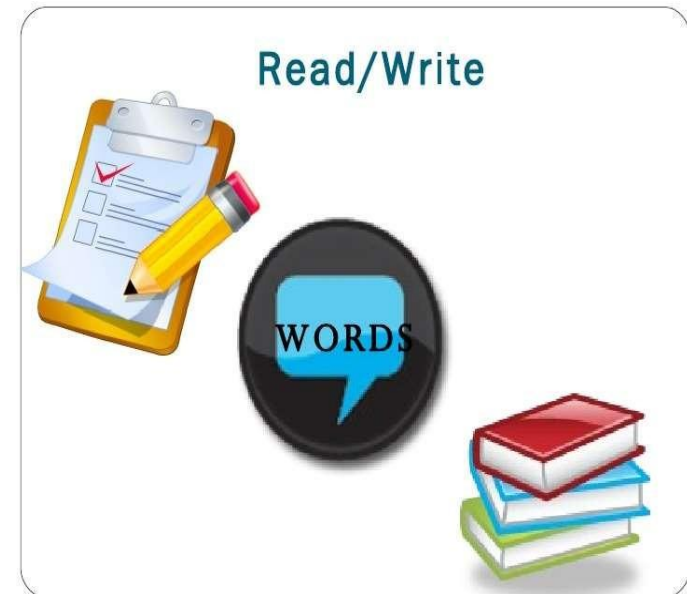
- Prefer to hear information spoken
- Can absorb a lecture with little effort
- May not need careful notes to learn.
- Often avoid eye contact in order to concentrate
- May read aloud to themselves
- Like background music when they study



Diverse learning styles

Read/ Write Learners

- Prefer to read/write information spoken
- Can absorb a lecture with little effort need careful notes to learn
- Often avoid eye contact in order to concentrate
- May read aloud to themselves
- Writing will help them to remember & conceptualize



Diverse learning styles

Tactile or Kinesthetic Learners



- Prefer touch as their primary mode for taking in information
- In traditional lecture situations, they should write out important facts
- Create study sheets connected to vivid examples
- Role-playing can help them learn and remember important ideas
- May benefit by using manipulatives

Learning styles

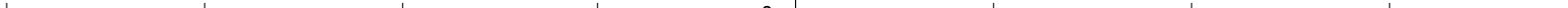
Exercise:

Fill in the given learning styles questionnaire to know your learning style

What do you learn?

Pragmatist

20
15
10
5
0



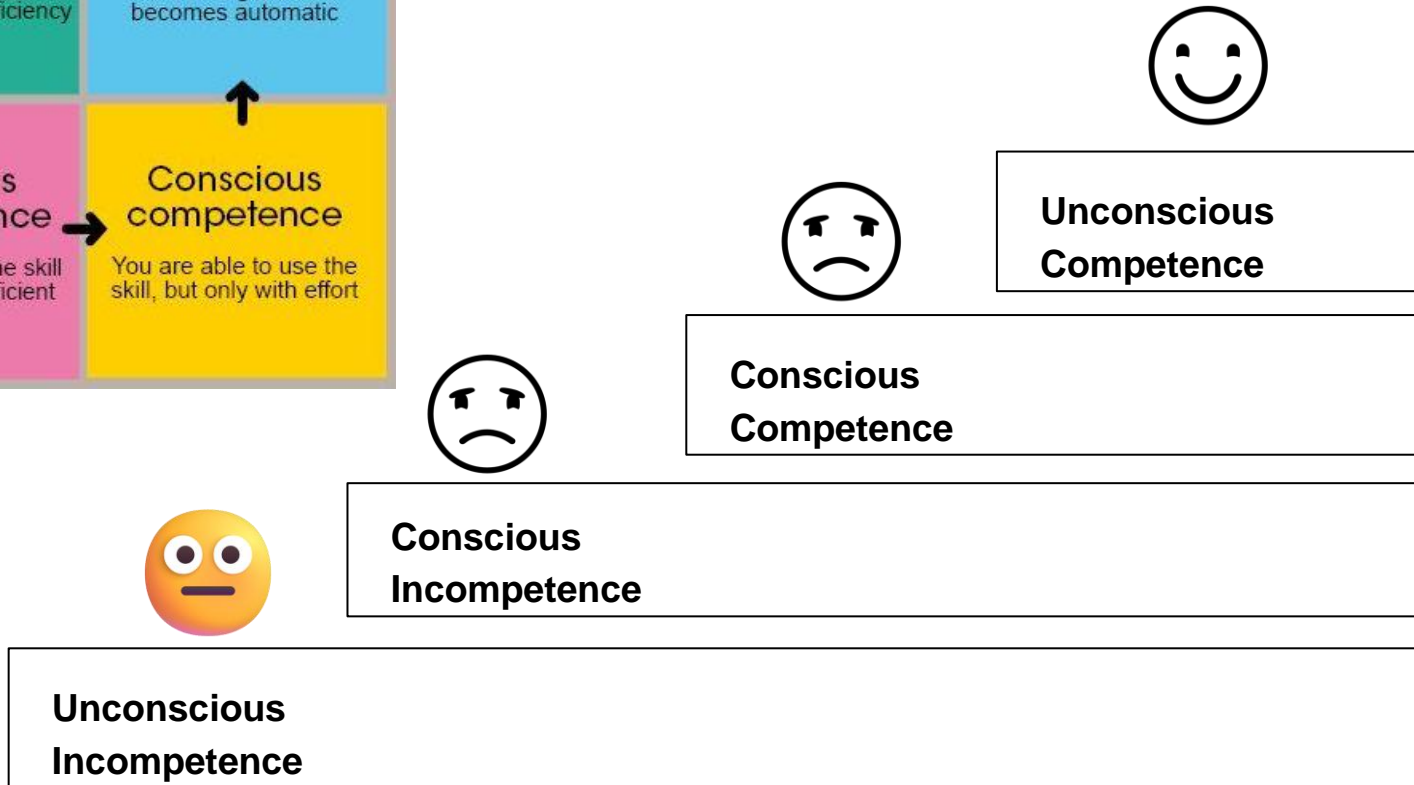
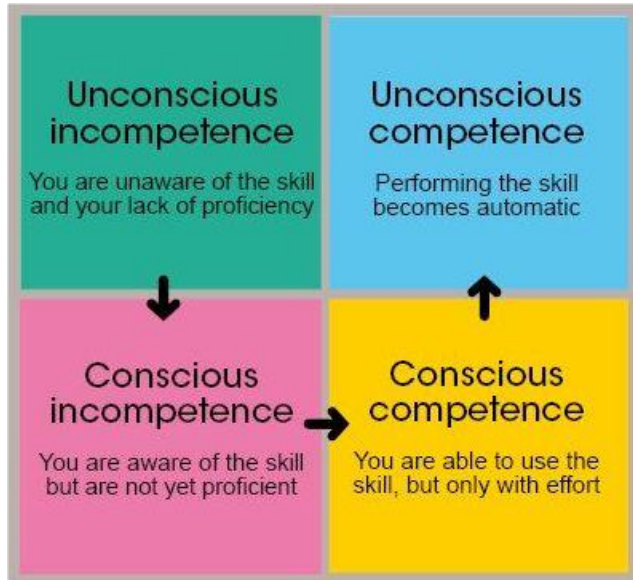
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Chapter 7: Audience

Goals

- Stages of Learning
- Generational Differences
- International Differences
- Evaluation
- Measurement
- Selecting Appropriate Delivery Methods

Stages of Learning



<https://www.youtube.com/watch?v=UhN2JUMWG6s>

Stages of Learning

Unconscious Incompetence

- Blissful ignorance. We are not aware that we don't know something. We don't know what we don't know.

Conscious incompetence

- We discover a skill we wish to learn – driving a car, riding a bike
- We have a desire to learn. Often this means not succeeding at first.
- This is learning; unfortunately, in our culture it is often labelled 'failure'.
- We feel uncomfortable.
- We know there is something we want to know, but we know that we do not yet know it.

Stages of Learning

Conscious Competence

- We acquire the skill. We have become consciously competent. Our conscious mind can only cope with a small number of new bits of information at any one time.
- We have to concentrate on what we need to do.
- We can do it, but it is difficult and stressful.

Unconscious competence

- Lastly, we blend the skills together and they become habits - we can then do them while our mind is on other things.
- We have reached the stage of unconscious competence.
- Our confidence and ability have peaked, we no longer have to concentrate on what we do; this is the start of the next learning curve

International Differences

Any business when expands to international level should face International differences. These are five challenges to consider when training a global workforce:

- **Cultural Differences.** Groups and individuals view and behave at work differently around the world, so taking a “my way or the highway” approach won’t cut it. Depending upon the region or country, employees are motivated in different ways, employers have varying expectations of employees (and vice versa), and cultural norms affect the approach of business relationships, seniority, and communication styles. Additionally, each country brings its own specific regulations regarding hours, compensation, and training protocols.

International Differences

- **Language Barriers.** One of the most obvious issues of training an international workforce comes with the different languages and varying levels of language competency of employees. Not only are there a multitude of languages present in global teams, but each language possesses countless regional dialects and even hyper-localized dialects that can present tricky issues for communication.
- **Regional-Based Customization.** Curriculum designed for Europe won't work in Asia, nor will curriculum tailored for South America address needs in North America. Core topics may remain the same, but intense specialization is required based on location and culture. Not getting customization right will negatively affect productivity and compliance.

International Differences

- **Time Zone Differences.** Live webinars and calls are difficult to coordinate when dealing with a 14-hour time difference, as with the western U.S. and Singapore, or nine hours with much of Europe. Scheduling and logistics require more thought, coordination, and communication.
- **High Cost.** The expense of global training increases for translation and customization of materials. Every one hour of new or customized content often requires 10 hours of development time. Further, if training in person, travel expenses boost cost dramatically. This can't be avoided. I was once asked, "Is training worth the investment? What if I pay to train them and they leave?" My response: What if you don't train them and they stay!

Evaluation

Evaluation is essentially concerned with judging the worth or value of an activity or event. This helps to identify ways in which such activities or events can be improved in future.

- Identify and illuminate what is actually occurring in the area or activity that is the subject of evaluation, and produce sufficient information to enable the evaluator, using agreed criteria, to make valid and useful judgements about what is being evaluated.
- When evaluating the performance of your class, you are measuring them against the standards for satisfactory performance provided in your course material, especially the course objectives.

Usage of visual aids (types & benefits)

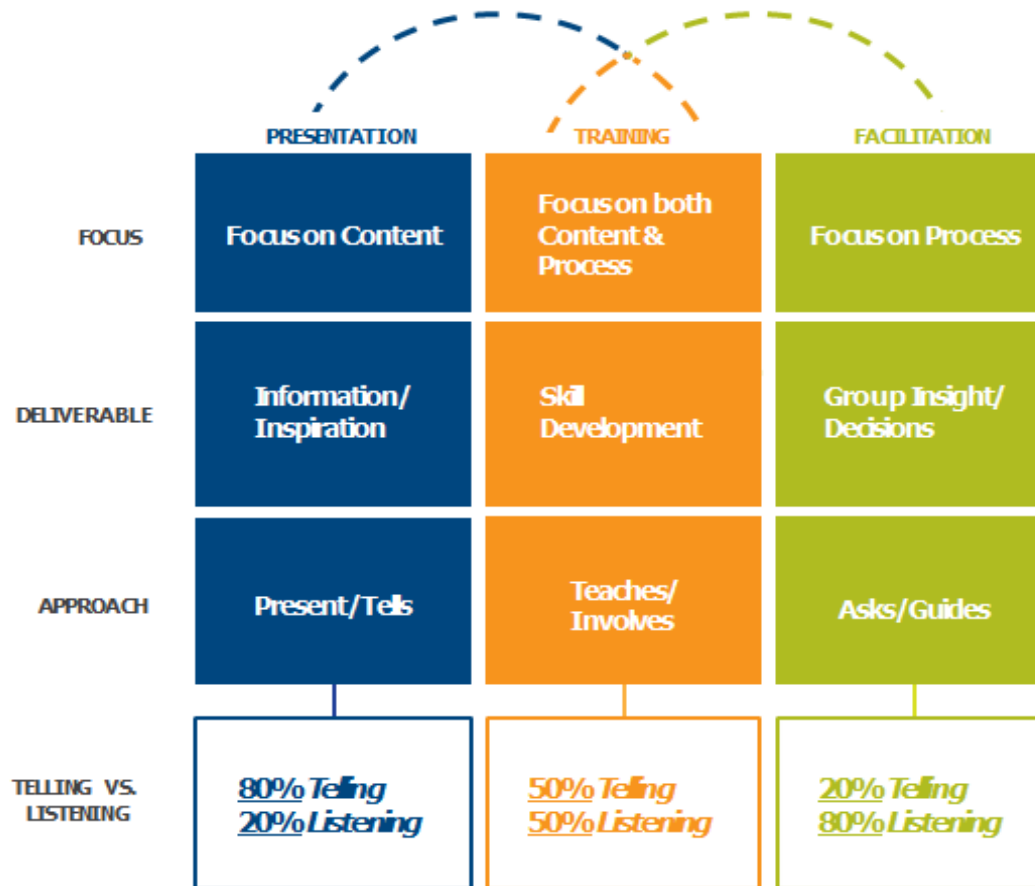
Three visual aids are—slides (overhead transparencies or PowerPoint slides), whiteboards, and flip charts



Usage of visual aids (types & benefits)

Visual Aid	Strengths	Weaknesses
SLIDES	<p>Trainer can face the class.</p> <p>Overlays permit dramatic illustration.</p> <p>Enables standardization of training materials.</p>	<p>Equipment not always readily available.</p> <p>Can be tiring or boring if overused.</p> <p>Equipment malfunction or operator error.</p>
WHITEBOARDS	<p>Easy to alter.</p> <p>Allows on-the-spot illustrations.</p> <p>Ample space for development of ideas.</p>	<p>Can be messy to use.</p> <p>Once erased, the idea is gone.</p> <p>Time is needed to erase or clean board.</p>
FLIP CHARTS	<p>Can be easily moved.</p> <p>Pages can be torn off and displayed or saved for future reference.</p> <p>On-the-spot reinforcement of ideas stimulates participation.</p>	<p>Sheets become worn or torn with age.</p> <p>Space required to store charts.</p> <p>Visibility can be a problem.</p>

Presentation versus Training versus Facilitation



Presentation versus Training versus Facilitation

- **Presentation** is an activity in which someone shows, describes, or explains something to a group of people.
- **Training** is the action of teaching a person a specific skill or type of behavior. **Training** is about building skills through active involvement and interaction. Training is about *doing it.*”
- **Facilitation** is the act of helping other people to deal with a process or reach an agreement or solution without getting directly involved in the process, discussion, etc. Typical presentations involve listening and watching. They demand no active response from listeners unless they include a “Q-and-A” session at the end.

Presentation versus Training versus Facilitation

- So, if I attend a facilitated session, I expect the facilitator to stay out of the conversation.
- If I attend a training session, I expect activities and skill practices.
- And, if I attend a presentation, I expect something like a lecture



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Chapter 8: Class Room Management

Classroom engagement

Engagement is the involvement of the minds of all learners with that which is to be learned.

- **EXPLICIT:** Expressing understanding of the task in a clear and obvious way.
- **IMPLICIT:** The state of being involved. Understood, but not specifically expressed by the learner.



Classroom engagement

Explicit Engagement :

What you might hear a trainer say:

Explicit:

- Signal me when you have decided which topic !
- Jot down a three sentence summary of yesterday's!
- In pairs, read one section to each other, then !
- Create a skit that portrays the elements !



Classroom engagement

Implicit Engagement

What you might hear a trainer say:

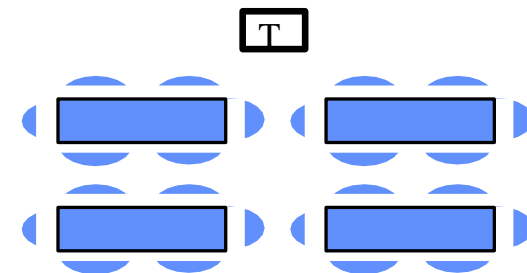
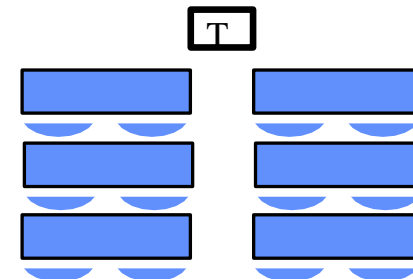
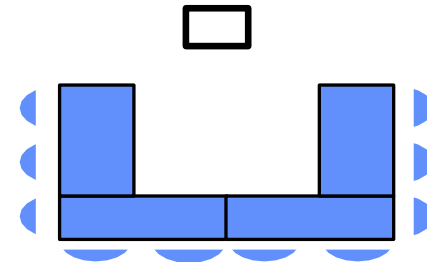
Implicit:

- Be ready to read me your introductory sentence !
- As you view this brief video, think about !
- In just a minute, I will ask each of you to share !
- Think about a time when you !



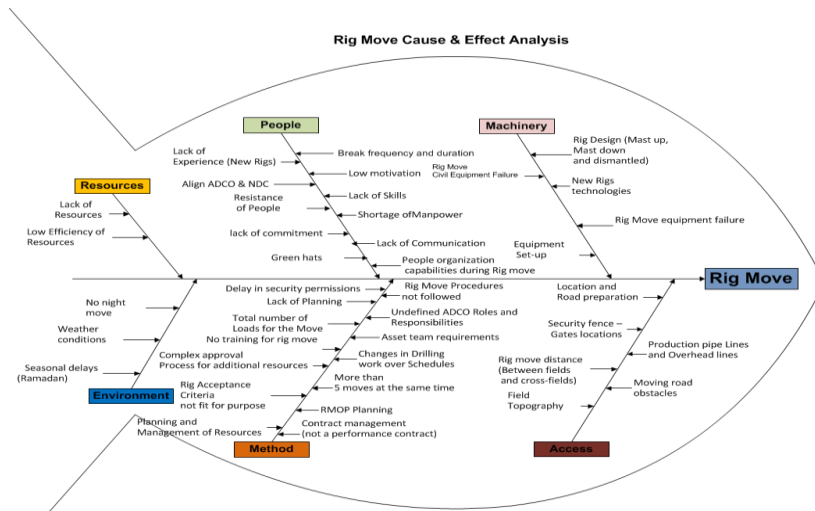
Classroom Management

Styles	Instructional Methods	Class Size
U-SHAPED	<ul style="list-style-type: none"> ◆ Case study ◆ Demonstration ◆ Group discussion ◆ Role playing 	5 – 25 trainees
CLASSROOM STYLE	<ul style="list-style-type: none"> ◆ Debate ◆ Slides, video, DVD ◆ Forum ◆ Lecture ◆ Panel 	Unlimited
TABLES IN THE ROUND	Any methods using sub-groups: <ul style="list-style-type: none"> ◆ Case study ◆ Group discussion ◆ Role playing 	15 – 50 trainees



Advanced brainstorming techniques

$$Y = f(X)$$



Y = Delay
X Factors = Causes



Advanced brainstorming techniques

6-3-5

- The 6-3-5 method is another brainstorming technique
 - that generates and develops ideas
 - by asking up to six participants to write, within five minutes, three ideas on separate cards or pieces of paper.
 - These cards or paper are then passed along to other participants for further refinement or additional ideas.
- Each round lasts for 5 minutes and the 6 participants are asked to generate up to 3 ideas per round.

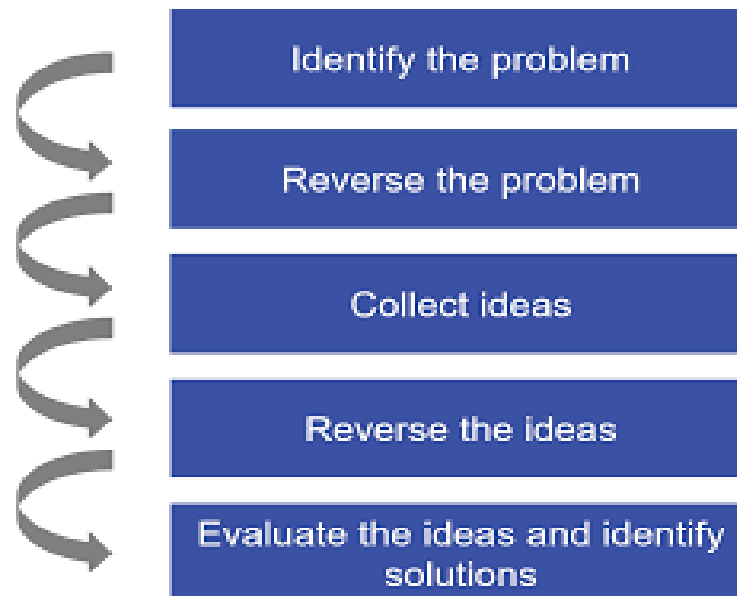
Advanced brainstorming techniques – 6 3 5



Advanced brainstorming techniques

Anti Solution

- Team brainstorms on how to increase the problem rather than solving it.
- The brainstormed ideas are reversed to get the solution.



Demonstrate the technique of mind mapping

Mind mapping it to get the big picture and determine the manageable chunks of learning, logically sequencing it. Omitting what is non-essential on the basis of "need to".

MIND MAPPING

- This is a brainstorming technique. It helps in concept development and adds to the synergy of idea exchange.
- This technique can be used to cover several facets of a topic at one time and to help sort ideas into categories.
- To create a Word Web, give the small group a big piece of paper, and each person a different colored marker.

Demonstrate the technique of mind mapping

CREATING A MIND MAP

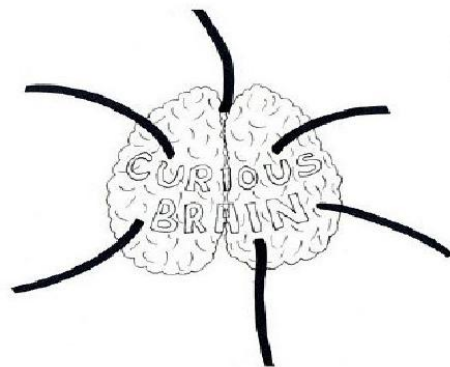
- Using a Mind Map in the context of the training allows it to be broken into manageable logical sequence. Each key area is broken down further into sub-areas which then require their own performance objective and session



Demonstrate the technique of mind mapping

Exercise

- Let us create a mind map on a topic of our choice

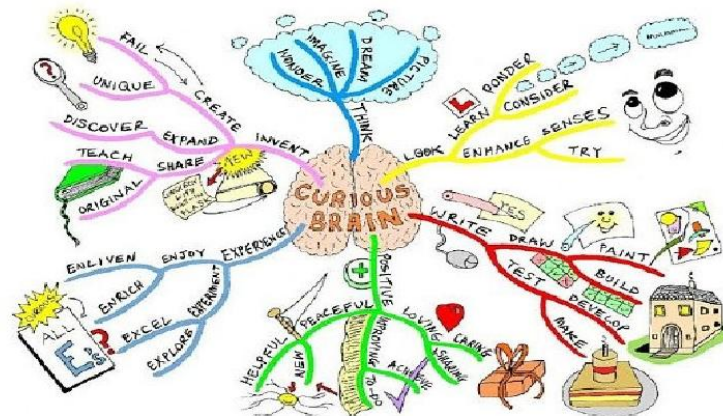


to Finish



Drawing a Mind Map

← From Start



Demonstrate the technique of mind mapping

DECIDING ON THE LOGICAL SEQUENCE

- Tasks, skills and procedures are the most self-sequencing. A task is achieved generally through a logical sequence.
- A task mind map would document all actual steps.
- A secondary branch would capture –
 - All related knowledge or skills.
 - All critical attitudes required to perform the job completely.
 - All technical knowledge required to performing the work efficiently.

Mind mapping - steps

1. Start in the CENTRE of a blank page turned sideways. Why? Because starting in the centre gives your Brain freedom to spread out in all directions and to express itself more freely and naturally.
2. Use an IMAGE or PICTURE for your central idea. Why? Because an image *is* worth a thousand words and helps you use your Imagination. A central image is more interesting, keeps you focused, helps you concentrate, and gives your Brain more of a buzz!
3. Use COLOURS throughout. Why? Because colours are as exciting to your Brain as are images. Colour adds extra vibrancy and life to your Mind Map, adds tremendous energy to your Creative Thinking, and is fun!
4. CONNECT your MAIN BRANCHES to the central image and connect your second- and third-level branches to the first and second levels, etc. Why? Because your Brain works by *association*. It likes to link two (or three, or four) things together. If you connect the branches, you will understand and remember a lot more easily.

Mind mapping - steps

5. Make your branches CURVED rather than straight-lined. Why? Because having nothing but straight lines is *boring* to your Brain.
6. Use ONE KEY WORD PER LINE. Why? Because single key words give your Mind Map more power and flexibility.
7. Use IMAGES throughout. Why? Because each image, like the central image, is also worth a thousand words. So if you have only 10 images in your Mind Map, it's already the equal of 10,000 words of notes!

Demonstrate the use of advanced lecture techniques

Categorized by Levels of Student Interaction

- **Formal lecture.** The lecturer delivers a well-organized, tightly constructed, and highly polished presentation.
- This type of lecture works well for teaching large groups of participants and has been popularized by outlets such as TED Talks
- In the formal lecture, participants hold questions until the conclusion of the lecture.

Demonstrate the use of advanced lecture techniques

- **Lecture-discussion.** This type of lecture encourages greater participant participation.
- The instructor presents the talk, but he or she stops frequently to ask participants questions or to request that participants read their prepared materials.
- The direction of interaction can occur in one of three ways:
 - (1) instructor to class,
 - (2) instructor to individual participant, or
 - (3) individual participant to instructor.

Demonstrate the use of advanced lecture techniques

- **Interactive lecture.** In this version of lecturing, the instructor uses mini-lectures about 20 minutes long, and involves participants in a range of brief content-related activities in between.
- Interaction may occur between instructor and participants or between and among participants.

Demonstrate the use of advanced lecture techniques

- **Problem-solving lecture** . In this type of lecture, a problem serves as the focus.
- The lecturer outlines the main problem, the key known elements, and the elements that remain to be discovered.
- During the lecture, the instructor typically works through the problem and demonstrates a solution or various possible solutions.

Demonstrate the use of advanced lecture techniques

Categorization by Medium

- **Naked lecture.** The term “teaching naked” was popularized by Jose Bowen (2012) in his similarly titled book.
- Bowen argues that trainers have much to gain by taking technology out of their classrooms.
- He argues that teaching without technology, “naked,” will improve participant learning. Instructors who adapt this approach talk directly to participants without the intervening agency of technology; alternately, they use technology outside of the classroom and reserve in-class time for direct communication with participants.

Demonstrate the use of advanced lecture techniques

- **Chalk and talk lecture.** This approach is so named because of early uses of lecture in a classroom with a blackboard and chalk. While some professors still use a blackboard, whiteboards and markers and smart boards are supplanting the earlier tools.
- Regardless of the tools used, the key characteristic of this approach is that the instructor lectures while generating notes on a medium that participants can see.

Demonstrate the use of advanced lecture techniques

- **Multimedia lecture** . A multimedia lecture, once called the slide lecture because of the slide-talk approach, is one of the most commonly used approaches today.
- Instructors use audio-visual software packages such as PowerPoint or Prezi to highlight key points of text.
- The term “death-by-PowerPoint” is one that trainers should keep in mind, particularly as something to avoid, when using this approach.

Demonstrate the use of advanced lecture techniques

Video lecture.

- This type of lecture is one in which an instructor lectures and is captured on video as a talking head.
- At times, the video may alternate between showing headshots of the instructor and full screen visuals of the slides.
- This type of lecture is often used in the service of online learning and blended learning.
- More recently, this approach has seen increased usage as part of the flipped classroom strategy (Ronchetti, 2010).
- Lectures across different categories work together. Thus, an instructor may give a semiformal, problem-solving, chalk and talk lecture, while another may offer a lecture-discussion, point-by-point, multimedia lecture.
- Although different disciplines exhibit norms around a common combination, the full range of combinations appear across college and university classrooms.

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Chapter 9: Dealing with tough training times

Dealing with nerves

Trainers might be nervous about speaking in public or being in the spotlight.

- To ensure that tasks are carried out successfully, educators should not be asked to undertake activities that are beyond their limits.

Managing Nervousness and Stage fright

Note: If you are nervous, don't announce it.

- Once you do, your audience feels obligated to worry about you.
- Contrary to popular belief, some nervousness is good for you and your presentation.

Dealing with nerves

To manage nervousness and stage fright:

- i. Get enough sleep the night before.
- ii. Accept the fact that you are nervous. Use it as a positive influence.
- iii. Take a brisk walk just before you present. Keep your body awake and alert.
- iv. Don't sit with your legs crossed. It does not present a positive image and one of your legs may go to sleep.
- v. Let your arms dangle at your sides to facilitate the draining of tension.
- vi. While your arms are dangling, twirl your fingers loosely to improve circulation.
- vii. Keep your shoulders down. The more you hunch them up, the more tense you will become.

Dealing with nerves

- viii. Move your jaw back and forth to reduce the tension in the muscles of the side of your face. Open your mouth widely when you speak.
- ix. Practice slow, deep breathing for about two minutes just before you are to speak. This ventilates the body and helps ease the stress.
- x. Use silent, encouraging phrases for yourself, like "Let's go!" or "This is going to be a great presentation."



Dealing with nerves

– **Be prepared**

When you are well prepared for your training, it will help you to relax. And with preparation, I don't mean thinking about 100 things that can go wrong. But simply knowing your course content and course structure. Make a checklist what to bring to the training and have a lesson plan.

– **Dress to impress**

The last thing to worry about should be what you're wearing. Don't wear clothes that you haven't worn before. Make sure you look good and dress appropriately. This also applies to your footwear. And don't dress too warm: you'll be warm due to your nerves and will be moving around in the room. Training delivery can be hard work, so wear a layer that you can take off, like a jacket, shawl or cardigan.

Dealing with nerves

– Arrive early

You want to avoid running into a training room full of learners and having to start with the training session immediately. Allow yourself extra time to get to the training venue as both traffic and public transport can be busy. It will give you time to set up the training room to suit your needs and test your AV equipment.

– Breathe

Focusing on your breathing is a good way to relax and manage your nerves. Try to breathe in through your nose, hold your breath for 3-5 counts and then breathe out via your mouth (yes, you can try it now). When you repeat this a few times, you will feel better and more relaxed.

Dealing with nerves

– Relax

Before you start your course, take a few minutes to relax. Do your breathing exercise, think about something nice, or hum your favourite song. Look around the room, make eye contact with the learners and think: Yes, I can do this!

– Build rapport with the learners

When learners start coming into the training room, welcome them and have a chat. They might be nervous too. It will help both of you to relax and build rapport. Draw a layout of the room and write down their names as soon as they sit down. Knowing the learners' names quickly will earn you a few 'brownie points'. Don't get distracted by that one person that doesn't want to be in the course. Start with focusing your energy on the others.

Dealing with nerves

– **Stand steady and move around**

A trainer who is standing in front of the room shows more authority and will get more attention than the one who is sitting while presenting. So get off your chair and stand with your feet a bit further apart. That will make you feel more grounded. Moving around in the room will also help you to relax but try to find the right balance.

– **Set house rules**

When you are starting as a trainer, you might get distracted when learners are asking questions all the time or are checking their phone. If that's the case, set some house rules together with the group before you dive into the content. Simple rules about phone use, arriving back in time after a break and when you would love to hear and answer their questions, will take away some of your stress.

Dealing with nerves

- **Be confident**

This might sound strange when you are nervous, but the attendees are coming to your course to learn from you! You're the expert. Trust your expertise and your skills. You are prepared and ready to share your knowledge. Also realise that it is not an issue if you don't have the answer to every question. Admit that you don't know everything (you're not an encyclopaedia) and promise to get back to them with an answer. That could be after a break or by email after the training.

- **Ask questions**

Why not ask the learners questions, initiate a discussion and give them activities to do. It will take the pressure of you and create a better learning experience and a more relaxed learning environment

Getting participants back on time.

Here are the best seven tips for getting participants back on time.

1. Tune them in

- To get their attention and get them moving back to their seats, pick a brief, up-beat song. Explain to the participants that every time they hear this tune, they will have 30 seconds left before the session resumes.
- In this way, the music acts as a transition between activities or is used to denote the conclusion of a break. You will be surprised at how effective this is.

Getting participants back on time.

2. Set a timer

- Set a timer so the participants know exactly how much time they have. There are a variety of free countdown timers available on the web.
- As an extension, the trainer could give out playing cards for the people that make it back on time.
- At the end of the day, the person with a winning hand (either the best poker hand, highest sum, best card, etc.) wins a prize.
- People love free stuff. The better the prize, the more likely they are to be on time!

Getting participants back on time.

3. Set odd times

- Rather than setting a break time of 20 minutes, set odd times for breaks like 13 minutes or 17 minutes. This will create a certain “stickiness” that helps participants to remember how long the break is. This also works for staff meetings - Instead of Monday meetings at 9am, try setting the meeting time for 9:11!
- Alternatively, you could use a random selection for break times using dice, playing cards or bingo balls. The variety in break durations will be more memorable because they are different. As a result, participants are more likely to honour them

Getting participants back on time.

4. Make them responsible

- Get someone else in the group to be responsible for coming back on time.
- Peer pressure can be used in a wholesome way to manage the late comers, without the trainer having to intervene.
- In a longer program the trainer can share the coveted role of 'timekeeper' across the group to further develop the idea of shared responsibility. In this way, the timekeeper role is very transparent.
- However, as an alternative, you can give one of your slightly tardy participants a secret challenge (where they only win if no one knows that they have the role to get people back and everyone is back on time).
- This variation will have the effect of managing their late-coming behaviour, without impacting adversely on the rest of the group.

Getting participants back on time.

5. Share the magic

- Inspire the group by scheduling a magic trick immediately after a break.
- People can be intrigued by magic and a good, yet simple trick will give them an incentive to come back on time.
- You could build it up if you like, promising a truly mind-bending
- Activity after the break. (However, you will need to deliver upon the hype and have a well-rehearsed and visually stimulating trick!) A variation on the magic trick is to do the trick before the break and tell them you'll give them the instructions (or the secrets) after the break. Again there is some incentive to return on time.

Getting participants back on time.

6. Text them

- In between classes you can remind participants of key activities to be completed, resources to bring and the suggested commencement time of sessions.
- This will be particularly useful when training Generation Y candidates or busy professionals on the run.
- There are a plethora of web-based, mass text message applications available which could be used to support this activity.

Getting participants back on time.

7. Reward them

- When all else fails, bribe them with chocolates, coffee, bags, books or other prizes for returning on time.
- This may include resources that you were already planning to give away. However, by using it as an incentive, you have a chance to modify the group's behaviour.
- Over time, the participants will get into the routine of coming back when they should and you can wean them off the material prizes.
- Ultimately, nothing beats creating training relationships built on mutual respect and trust and there is no magic bullet to compel participants to come back on time.
- However, these simple, yet effective techniques will allow you to win time back more often than not and will give you the best chance of starting on time.

Dealing with tough participants

Manage Difficult Participants

- Managing participants in a training situation is an important skill to have as a trainer.
- Using “ground rules” (see handout on Ground Rules) at the beginning of the training can provide a means of establishing how people should act during the training.
- When there are participants who are difficult, it is up to the trainer to manage the situation so that participants do not disrupt the training.
- Following are examples of difficult participants and how their behavior can be managed

Dealing with tough participants

DIFFICULT/CHALLENGING PARTICIPANTS

Remember:

Not all participants may have the same agenda as you do

Not all participants will agree with your point of view

Not all participants are necessarily willing students



Dealing with tough participants

IN GENERAL . . .

- Be organized – Be on time – Be professional
- Don't take things too personally – the most gifted of Instructors run into difficult participants from time to time
- Don't argue with any one – take that type of discussion off line

Dealing with tough participants

SPECIFIC DIFFICULT TYPES



Dealing with tough participants

AIR HOG

- Monopolizes air time during group discussions



Getting participants back on time.

THE DISPUTER



- Argues with everyone including the Instructor
- Contradicts people, using phrases like “That’s stupid”, “That’s wrong”

Dealing with tough participants

THE UNFOCUSED



- Have difficulty making their point and may sound confused

Dealing with tough participants

THE SARCASTIC SNIPER



- Makes sarcastic comments, often in low tone of voice
- Uses humour as a way of sending a critical message

Dealing with tough participants

THE NEGATIVISIT



- Always points out faults and the downside of ideas
- Hates group work and makes it difficult for others in the group with constant criticism
- Doesn't contribute to finding a solution but always points out how it might fail.

Dealing with tough participants

THE SOCIALIZER



- Chats to others around him/her while others are speaking
- Carries on a side conversation while you are talking

Dealing with tough participants

THE DOZER



- Eyes are closed during presentations
- May nod off
- Has trouble staying awake

Dealing with tough participants

“Dominates the conversation”

- There is usually at least one person in each group that tries to dominate the conversation.
- They frequently have a lot of experience and knowledge and are very eager to share that with everyone.
- Ways to manage this behavior include:
 - Refer to the ground rules (Be sure to include in the ground rules that no one person should dominate the conversation and that all participants should have the opportunity to contribute)
 - Thank them for their valuable contribution and say that we need to also hear from other participants
 - Mention that they have already provided a lot to the discussion and you want to hear what other people have to say

Dealing with tough participants

- Use body language such as not looking at them when asking for responses and standing in front of them and looking at the other participants for responses
- When asking for responses it may become necessary to ignore them
- It may become necessary to interrupt them and summarize their comments before hearing from other participants
- Give them a task to do that supports the course objectives
- If necessary, speak to them outside the training room

Dealing with tough participants

“Interrupts others”

- Some participants have a habit of interrupting others so as the trainer it is important to manage this type of behavior.
- Ways to manage this behavior include:
 - Refer to the ground rules (make sure that one-person should talk at a time is included as a ground rule at the beginning of the training).
 - If they continue interrupt mention that the other person was not finished.
 - If necessary, speak to them outside the training room

Dealing with tough participants

“Know-it-all”

- Some participants will try to challenge the trainer or try to make the trainer look bad.
- They think they know everything and will make remarks to undermine the knowledge or authority of the trainer.
- Ways to manage this behavior include:
 - Acknowledge their valuable experience and ask if there are other opinions
 - When they ask you a question ask them what they think the answer is or open up the question to others
 - Give them a task to do to help with the training
 - If necessary, speak to them outside the room

Dealing with tough participants

“Does not participate”

- Some participants will not respond. They may be shy, or not interested, or have been forced to attend the training, or may not be an appropriate person to be attending the training.
- Whatever, the reason it is important to encourage all participants to contribute.
- Ways to manage this behavior include
 - Use your body language to encourage them to participate.
 - Look directly at them when asking to hear from some of the people who have not contributed
 - Stand by them and look at them when asking questions

Dealing with tough participants

- Talk to them outside the training room to establish a connection
- Find out about their experience and knowledge so that can be incorporated into questions.
- Ask them to help you in some way (i.e., write on the flip chart, pass out papers, summarize key concepts)
- If necessary, ask them outside the training room why they are not involved in the training.

Dealing with tough participants

“Does not want to be at the training”

- Some participants are forced to come to the training by their supervisors.
- So they can resent the training and see it as a punishment rather than an opportunity to learn.
- Ways to manage this behavior include:
 - During the introduction to the training you can mention that everyone is coming to the training for different reasons that you would like to set a tone of open-mindedness because everyone can learn something from any situation.
 - Emphasize the value of each individual and how they will contribute to the success of the training.

Dealing with tough participants

- Specify the follow-up process to the training.
- Emphasize that they may need to demonstrate the skills as part of their job requirements.
- Also, some people like to attend trainings because it simply gets them away from the office or they can earn extra money through the per diem.
- As a result, they may not think that their active participation or learning the content is necessary.
- Ways to manage this behavior include:
 - Emphasize the value of each individual and how they will contribute to the success of the training.
 - Ask them to help you in some way.
 - If necessary ask them outside the training room why they are not involved in the training.

Dealing with tough participants

- Specify the follow-up process to the training.
- Emphasize that they may need to demonstrate the skills as part of their job requirements.
- This situation can be avoided by ensuring that the right participants attend the training.
- Communicate with supervisors about the criteria for who should participate in the training.

Dealing with tough participants

What they do	What you would do
Talks too Much	<ul style="list-style-type: none"> · Thank him for his inputs, summarize and move on. · Invite others for their comments.
Doesn't talk at all	<ul style="list-style-type: none"> · Do not assume he is not interested or bored. · Test Assumptions. · Draw the person out by asking him directly (i.e. calling his name) for his comments. · Alternatively, introduce group discussions and observe his participation rate.
Definitely wrong	<ul style="list-style-type: none"> · Do not belittle his response. · Comment by saying "That's interesting, how did you arrive at that conclusion?"
Hostile	<ul style="list-style-type: none"> · Maintain your composure. · Do not take it personally. · Seek Clarification. Suggest you take the issue with him "off-line". · Do not let him push his agenda over yours.
Side conversations	<ul style="list-style-type: none"> · Move closer to the persons, i.e. using body language as a Hint for them to stop talking. · Alternatively, ask if everything is ok with them.

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Chapter 10: Evaluating Training

Goals

- Provide an overview of the four levels of evaluation.
- Develop tools for Level 1: Reaction Evaluation.
- Develop tools for Level 2: Learning Evaluation.
- Describe Level 3: Behaviour Evaluation.
- Describe Level 4: Results Evaluation

Evaluation

- Evaluation is the last phase in the ADDIE Process Model.
- However, when you set learning objectives, you must consider evaluation as mentioned in the Magic Triangle.
- **Evaluation is to examine if the set objectives have been achieved.**
- In order to make objectives measureable, the evaluation of the objectives should be cleared when you define objectives.

Evaluation

Evaluation is done at four levels indicated below.

Kirkpatrick's Four Levels of Evaluation.

- **Level-1: Participants' reactions**
- **Level-2: Participants' learning**
- **Level-3: Participants' behaviour**
- **Level-4: Results**

Evaluation

Evaluation Methods

- Level-1 and 2 can be evaluated right after the training course in classroom,
- While Level-3 and 4 can be evaluated in participants' work places over a period of time.
- Thus these levels can be interpreted as steps in chronological order.

Objectives of Evaluation

- The objective of evaluation for facilitators is to obtain feedback for improving the quality of session.
- For the organiser, the objectives are to compile information for improving the whole course in terms of design and way of coordinating.
- Also each phase of ADDIE processes should be reviewed based on the feedback.
- Evaluation is not simply picking up weak points of facilitators or grading them.
- The organiser should clearly communicate to facilitators that evaluation is utilized for identifying what can be improved for the sake of achieving the training quality desired.
- Facilitators should consider the evaluation process as a constructive function.

Overview of Evaluation Methods



Overview of Evaluation Methods

■ Level-1: Reaction

- The first step to be done in the evaluation is to check participants' reaction.
- This can be conducted during or right after the programme.
- It is to evaluate **participants' impressions, feelings, satisfaction levels, etc.** Interview and questionnaire can be used as a tool.

■ Level-2: Learning

- Second step is to evaluate what extent has participants learned
- This can be identified by comparing before and after the training.
- Test, questionnaire can be used as a tool.

Overview of Evaluation Methods

- **Level-3: Behaviour**

- The third step is to evaluate what extent has participants' behaviour changed.
- This can be evaluated at their workplaces. It is to evaluate how much training gave impact on participants' performances in real situations.
- Self-check, interview, questionnaire, observation can be used as a tool.

Overview of Evaluation Methods

- **Level-4: Result**

- The last step is to evaluate what extent has training given impact on workplace as a final output.
- It should make clear profit to the workplace such as increase of sales, productivity and so forth including intangible benefit.
- It should be evaluated some time after the training. Data analysis, interview, questionnaire can be used as a tool.

Tools For Evaluation

Evaluation Methods for Training

- Daily participant evaluation forms (feedback sheets)
- Pros and cons lists
- Suggestion boxes
- "Where are We"
- Daily reflections
- Written pre-and post-tests
- Surveys
- Interviews
- Questionnaires
- On-site observations using checklists
- Supervisor's performance appraisal forms
- Focus groups
- Informal conversations

Tools For Evaluation

Method of Evaluation	Advantages	Disadvantages
Questionnaires	<ul style="list-style-type: none"> · anonymous · a chance to reflect prior to answering · hidden dynamics may be revealed 	<ul style="list-style-type: none"> · respondent must be literate · cannot explore answer with Px · possibility of misinterpretation by participants
Tests <ul style="list-style-type: none"> · Short answer · Fill-in the blank · Multiple choice · Case study · Skills assessment 	<ul style="list-style-type: none"> · can evaluate K,A,S learning related to learning objectives 	<ul style="list-style-type: none"> · same as above K,A,S · some people do not do well in a written test situation · require skill in reliable and valid test construction
Interviewing <ul style="list-style-type: none"> · Individual · Group 	<ul style="list-style-type: none"> · interviewer can press for deeper answers · can test meaning of an answer 	<ul style="list-style-type: none"> · no anonymity · requires skill, without training in obtaining unbiased data · interviewee or interviewer affected by each other's personality · participant may be reluctant to express views in a group or to an individual · time consuming

Tools For Evaluation

<p>Observation Performance (Past/Current) Performance checklist</p>	<ul style="list-style-type: none"> · based on experience or observations of individual's performance · observer's perception can add dimension when guided by an observation tool 	<ul style="list-style-type: none"> · subject to observers seeing only one side of problem · no opportunity to get trainee's statement of own need
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Tools For Evaluation

Evaluation Levels	Evaluation Steps	Evaluation Objectives	M&E Tools
Readiness (Level 0)	Step 1: Pre-Course Evaluation	To identify the expectations of participants and to promote the preparation of participants towards the course	Pre-Course Action Plan
Reaction (Level 1)	Step 2: In-Course Evaluation Step 3: End-Course Evaluation	To assess participants' satisfaction on courses and relevance of courses to the needs of participants	Observation/dialogue Questionnaire
Learning (Level 2)	Step 2: In-Course Evaluation Step 3: End-Course Evaluation	To assess whether participants have improved their knowledge through the course	Observation/dialogue Questionnaire Comparison of Pre-course and End-Course Action Plans
Behaviour (Level 3)	Step 4: Impact Survey	To assess whether participants continue to utilize the knowledge learned in the course and whether their work performance has improved after the course	Questionnaire Interview (with participants and their supervisors, colleagues) Observation at work place
Result (Level 4)	Step 4: Impact Survey	To assess whether the institutions that send participants to the course benefit from the training course	Questionnaire Interview (with participants and their supervisors, colleagues) Observation at work place

Presentation exercise

- Please present the topic allotted to you

Thank you!

Question time

Stay Connected!

- You can subscribe to Anexas Europe YouTube channel to get access to all the training material on video.
<https://m.youtube.com/channel/UCAk6IJsnpCsz7-rZTVx90uw>
- Please like our page on Facebook to stay updated about the latest videos on Training, Quality, Process Excellence and Project management
<https://www.facebook.com/denmarkanexas>

Stay Connected!

- Please join Anexas Europe LinkedIn Page for updates about latest developments

<https://www.linkedin.com/school/9379319/>

- Connect with the trainer– Amitabh Saxena on his LinkedIn account to see his latest videos on training quality topics

<https://www.linkedin.com/in/amitabhsaxena/>

Thank You!

- Congratulations on completing a milestone in your life!
- Best wishes for your MBB journey!

- Amitabh Saxena
Trainer