

Facilitation Skills and Training Guide

Training Team

Version 1.6 – 12/16/2008

Agenda

- Introduction
- Goals and Objectives
- Adult Learning Theory
- Team Teaching
- Role of the Trainer
- Presentation Essentials
- Problem Participants
- Parking Lot Strategy
- Preparing for Training Delivery
- Tools & Logistics
- Q&A

Introductions

- Introduction of each trainer and participant
 - Business unit
 - Job role
 - Shell background
 - Oracle experience



The Goal for This Session

Is...

To share with you proven practices on how to successfully use and present end-user course materials

Is Not ...

To review the content of your respective courses

Today's Objectives

- Review adult learning principles
- Describe ways to create a positive learning environment
- Describe ways to control problem participants
- Describe ways to engage participants in the class
- Understand good facilitative training techniques
- Describe a trainer's role in a training environment
- Know where and how to get support

Key Thoughts About Training

- The goal of training is Self Sufficiency not Proficiency
- You will not know the answer to every question trainees may ask
- Make the materials “your own”
- Stress our “blended learning approach” with end users
 - Computer Based Training
 - Classroom Training
 - Post Go-Live Support
- Set the expectation with participants that training is not about design, but about learning what has already been designed

Adult Learning Theory

Principles of Learning

- People learn best what they **actually perform**
- People learn from their **mistakes**
- People learn easiest with what is **familiar to them**
- People favor different **senses** for learning
- People cannot learn what they don't **understand**
- People learn through **practice**
- People learn better when they **see their own progress**

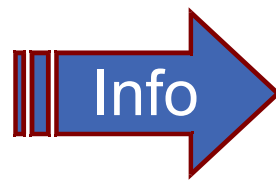


Adult Learning Styles

The three primary learning styles for adults are:

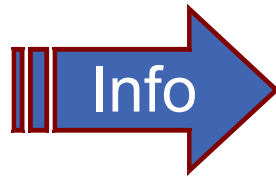
- **Visual**

*I **SEE** and I understand...*



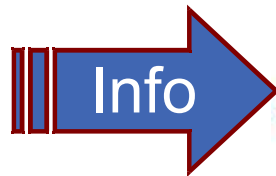
- **Auditory**

*I **HEAR** and I understand...*



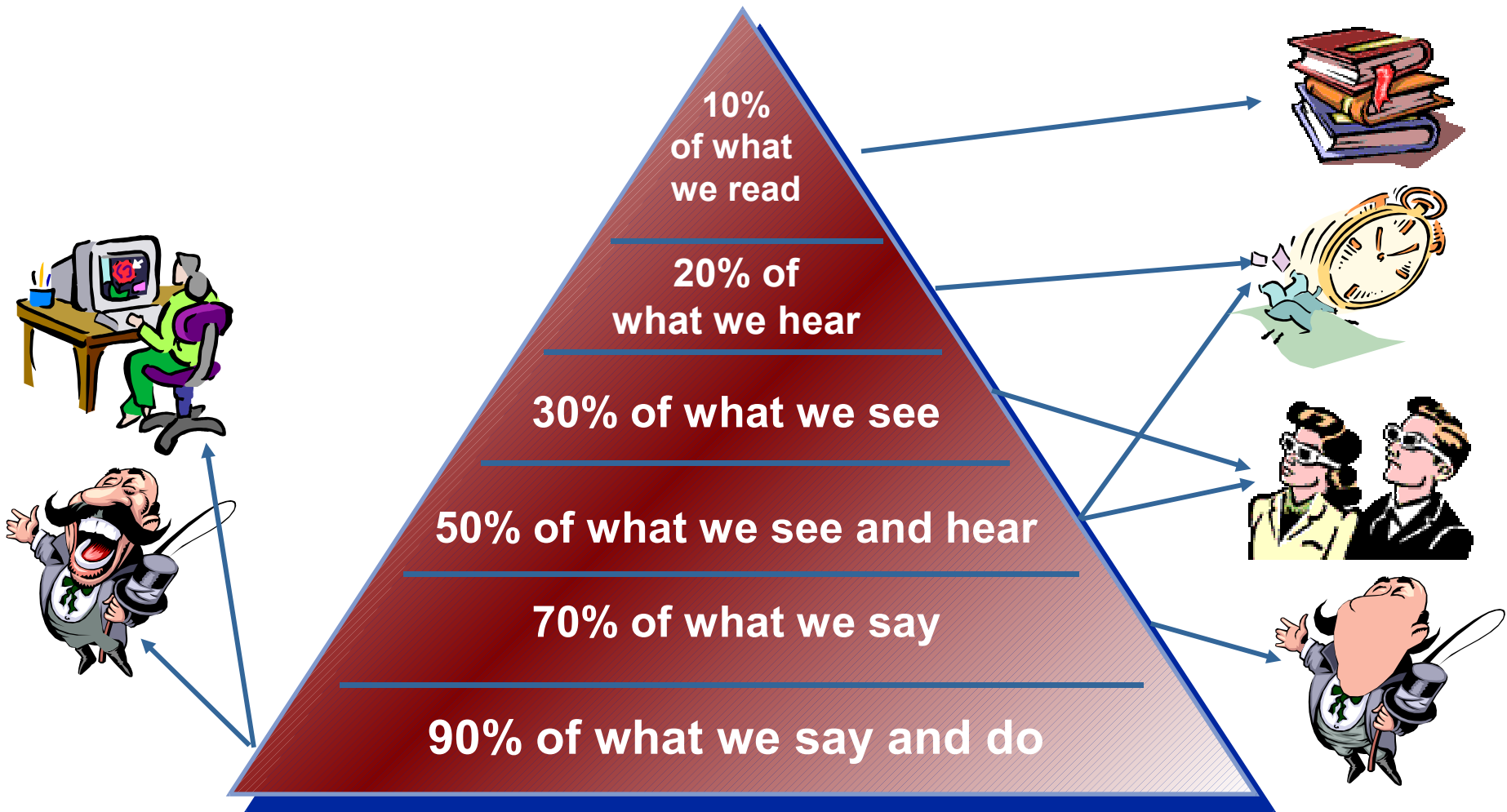
- **Kinesthetic**

*I **DO** and I understand...*



Psychological Characteristics of Adult Learning

We tend to remember ...



The Three Laws of Adult Learning

Laws that govern the way we learn:

1. Readiness

- Seeing a need to learn
- Feeling a desire to learn
- Being interested in the subject
- Skills to comprehend and use the information

2. Effect

- The more success we feel in learning, the more excited we get about learning

3. Exercise

- Practice makes perfect

Team Teaching

Team Teaching Roles

When possible, we will rely on a team teaching approach

- Some courses with a large number of classes may not always have two trainers in each class

Lead Trainer	Support Trainer
<ul style="list-style-type: none">▪ Delivers process training, demonstrates exercises, assists end users▪ Handles questions as they arise, with help from the Support Trainer▪ Keeps the class moving and on time	<ul style="list-style-type: none">▪ Assists Lead Trainer and end users with business-specific knowledge▪ Handles parking lot questions▪ Walks around during simulations▪ Helps keep track of time

Role of the Trainer

Role of the Trainer

- Manage the agenda and **keep track of time**
- **Summarize and review** course content to enable learners to be competent and confident
- **Actively listen** to learner's questions and feedback
- Facilitate a **positive and effective** learning experience
- **Motivate and focus** the group
- Manage **challenging** classroom situations



Manage the agenda and keep track of time

- Follow the class agenda and conclude the class on time
- Keep the course on track
- Be on guard for internal and external distractions
- Intervene when the discussion sidetracks
 - Be very careful of “tangents” – remember, we’re not here to solve business process issues

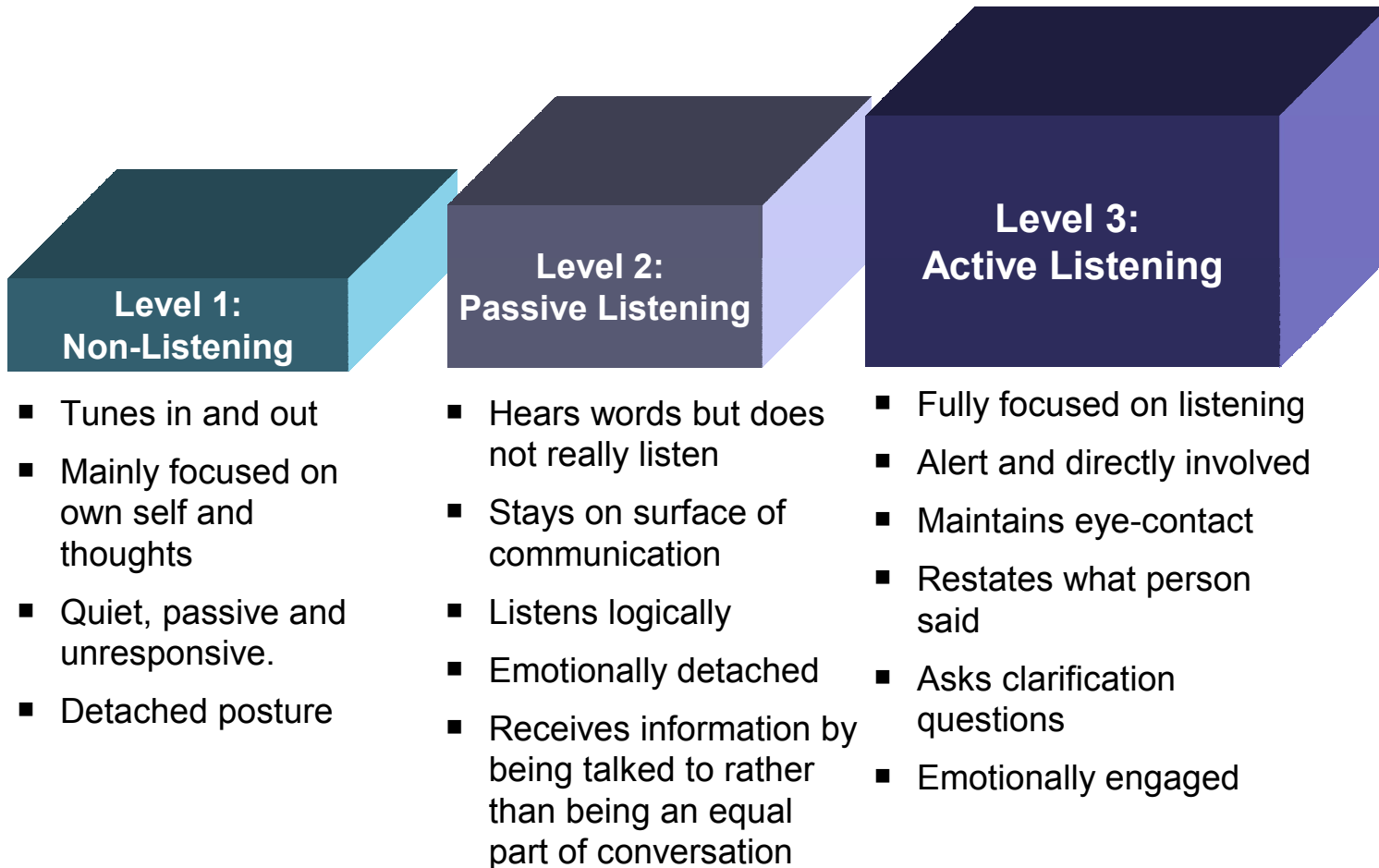


Summarize and Review: closely related in concept, but require different skills

Summarizing	Reviewing
<ul style="list-style-type: none">■ At certain points during the class, stop and show how far you've come... this is important especially in longer courses■ Summarizing gives participants a feeling of progress and improves their confidence■ Setup plateaus so learners can look back and see where they have been	<ul style="list-style-type: none">■ Prepares learners for the next lesson by refreshing their understanding<ul style="list-style-type: none">– Ask questions that invite discussion– Walk through the topic covered– Use a combination of the above methods

Actively Listen

There are 3 levels of listening:



Facilitate a Positive Training Environment

Help participants feel encouraged to learn and ask questions:

- **Be Fair**
 - Don't allow one person to dominate the discussions
 - Involve quiet or distracted participants
- **Stay Focused**
 - Stay on track - always refer to the agenda
 - Use discussions as an effective learning tool
- **Maintain Leadership**
 - Respond to confrontation strongly
 - Greet challenges openly and with a smile



Look Out for Problem Participants

The **Lost** Participant

- Stares blankly at the screen
- Does not follow along
- Remains silent

The **Frustrated** Participant

- No longer completes exercises
- Verbally communicates frustration
- Expresses negativity within training

The **Disinterested** Participant

- Types when an exercise is not being done
- Reads the screen intensely
- Chats excessively



Motivate your Participants

- Keep the trainee's self esteem high by using positive reinforcement
- Never make the trainee think that you do not have time for them
- Never criticize
- Wear a sincere smile



Constructive vs. Deconstructive Environments

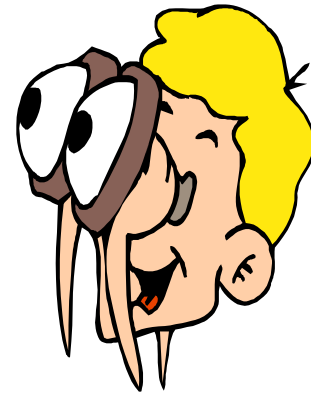
Create a positive environment with your words - you may say one thing, and the participant will hear something completely different

What you say...	What they hear...
<ul style="list-style-type: none">■ <i>“If you look carefully....”</i>■ <i>“I know you’re trying, but....”</i>■ <i>“Most people here understand...” “As most of you already know...”</i>	<ul style="list-style-type: none">■ <i>You didn’t do careful work</i>■ <i>No matter how hard you try, you wont get it</i>■ <i>You’re not as smart as most of the other people here</i>

Presentation Essentials

Trainer Presentation Etiquette

- Who the participants see delivering training will make a difference in how the trainer and the course is received
- “Trainer Presentation Etiquette is comprised of four key areas:
 - Posture
 - Gestures
 - Voice
 - Eye Contact



Trainer Presentation Etiquette

■ Posture and Gestures

- Avoid moving too much
- Avoid staying rooted to one spot
- Avoid turning your back to the participants



■ Voice

- Avoid acronyms
- Reinforce key items, using varying words, phrases, and style
- Vary your pace, tone, and volume



■ Eye Contact

- Avoid scanning the room
- Attempt to make eye contact with each individual



Effective use of presentation aids

■ Pinboard & Flip chart

- Visualise only the points that you are talking about at this moment
- Ensure that all participants can see your notes
- Talk in the direction of the trainees while you explain your notes
- Stand beside the pinboard / flipchart and show things with the hand nearest to the presentation aid
- Use the visualisation as a thread through your talk

■ Projector (Beamer)

- You might want to work with 2 persons to use a beamer (use of the mouse / talking)
- Use interactivity (animated slides, especially for complex processes)
- Prepare transparencies as a backup
- Be aware that you need to determine in advance which slides you want to show
- Check technical settings (compatibility)

Presentation Tips

What you should be doing:

- Communicate and reinforce behaviors positively
 - “Continue doing....”
 - Speak confidently about your material
 - Be humorous
 - Beware of your body language and gestures
 - Be fluid and relax
- Acknowledge that coping with change/conflict will require patience and persistence
 - Support the participant in their learning process, reinforce that everyone is learning new work steps and it will take longer to complete the same task initially
 - Remember, **self sufficiency not proficiency at Go-Live**

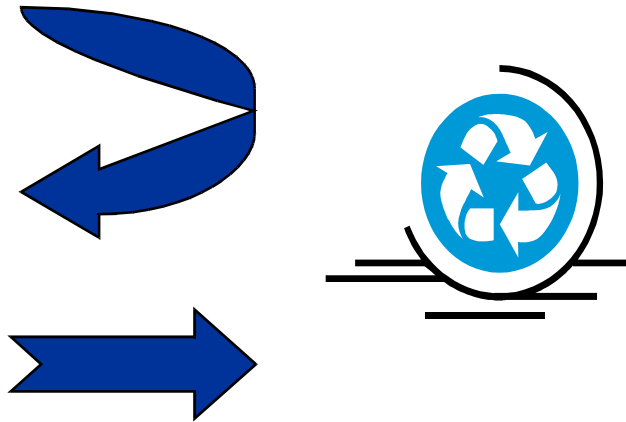
Presentation Tips (Cont'd)

What you should avoid:

- Using negative wording about course materials or transactions
 - “I’m only here to teach what’s in the manual, you’ll have to ask someone who knows”
 - Tell the participant, “You’re wrong”
- Point out individuals who may be struggling with the materials
 - Offer additional assistance during break, lunch or at another time
- “Oversell” the product or processes
 - Make promises what the system “will or could do”
 - Make up an answer

Questions

- Ask the entire class
- Ask one person
- Pass it around
- Ask a question to the person who posed it



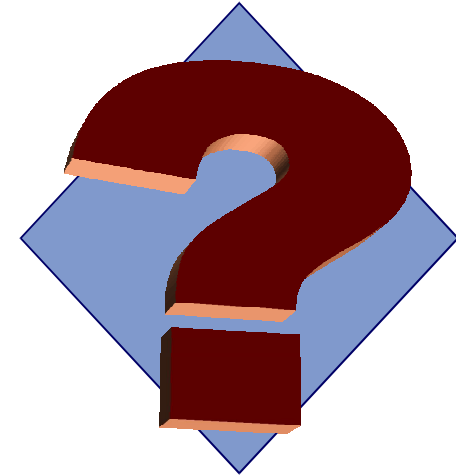
Question types:

- Closed
 - True/False
- Direct
 - Multiple Choice
- Open-ended
 - Essay
- Tag questions
 - Attention

Purpose of Questions

■ Purpose:

- To create and hold interest
- To stimulate and guide thinking
- To evaluate and summarise
- To distribute discussion
- To determine student attitudes
- To develop the subject



■ Answering questions:

- Repeat the question to ensure that everyone has heard it and that you've correctly understood it
- Try not to answer your own questions
 - Try rephrasing the question if you don't get an answer

Time Savers

- Start on time
- Give clear instructions
 - Do not start an activity when participants are confused about what to do
- Prepare visual information ahead of time
 - Do not write lecture points on flip charts or a black/white board while participants watch
- Distribute handouts quickly
 - Distribute handouts in key area of the room so others can assist with distribution
- Do not let discussions get too long
 - Express the need to move on
- Be prepared for tired and lethargic groups
 - Provide a list of ideas, questions or even answers and ask participants to select ones they agree with. Frequently, your list will trigger thoughts from participants
- Speed up the pace of activities from time to time by setting limits

Problem Participants

Behavior Drivers

- You will be presenting new concepts and ways of performing roles that will force people to change their old behaviors
- Some participants may have had previous training experiences that were not beneficial or too complicated
- People react to change based on some of the following perceptions or interpretations:
 - Lack of information
 - Anxiety
 - Loss of control

Coping with Behaviors

- Everyone copes with change and stress differently
- Recognize and acknowledge these behaviors
- Some tips coping with difficult behaviors:
 - Stay calm
 - Stay positive
 - Choose your response language carefully
 - Stay focused
 - Clarify the problem
 - Acknowledge their frustrations
 - Know when to call for a break
 - Know when you need management assistant

Anticipating Problems

- Being able to understand and identify with participants early may make all the difference for your training session
- Participants may feel resistance to change due to:
 - Job Insecurity
 - Unclear Objectives
 - Heavy Workload
 - Constant work pressure
- **Idea:** ask participants in the very beginning of class about what they may feel uncomfortable about

Managing Conflict

- Conflicts can be described as “errors in perception and/or interpretation”
- Make sure objectives of the training session are clear to the participants
- Quick tips to help you manage conflict:
 - Ask questions that help you get to the answer
 - Do not assume you know why someone is behaving the way that they are
 - Separate attacks on the material from your training style
 - Clarify what you thought you heard

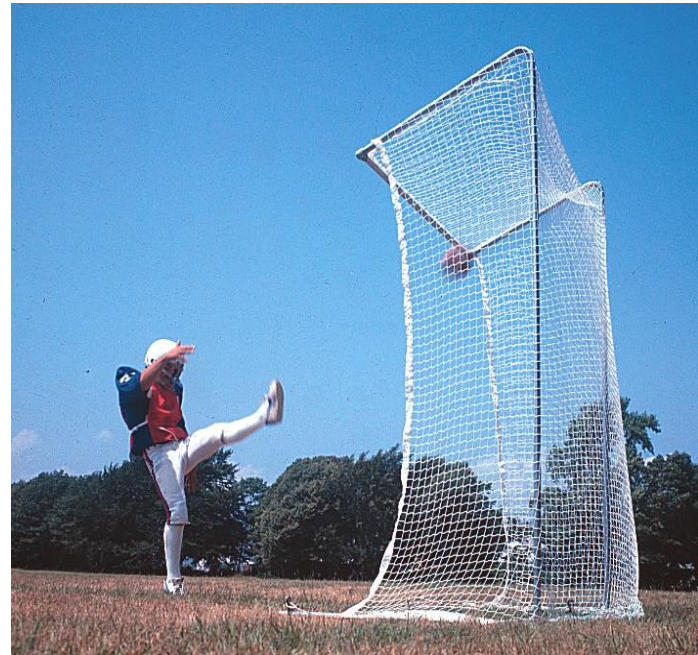
Steps to Managing Conflict (Cont'd)

Address the concern right away	Clarify the concern of the participant	Attempt to reach a mutual definition of the concern	Show your commitment to resolving the concern
<ul style="list-style-type: none"> ▪ Avoiding the concern adds fuel to the fire ▪ If the concern is individual, set a time to discuss and keep the class moving ▪ If the concern is class wide, consider resolving it immediately 	<ul style="list-style-type: none"> ▪ Allow the participant to voice their concern ▪ Use the parking lot to clarify the common goal – verify with participant that you have captured their exact concern 	<ul style="list-style-type: none"> ▪ Understand the concern before you try to solve it ▪ Work to reach an agreement for a solution ▪ If you are not able to resolve the concern on your own, use the parking lot and assure them that their concerns will be addressed 	<ul style="list-style-type: none"> ▪ You do not have all the answers ▪ Communicate the project's methods for addressing concerns that arise during training ▪ Don't dismiss concerns; it may be what opens the door for them to understand how their role works

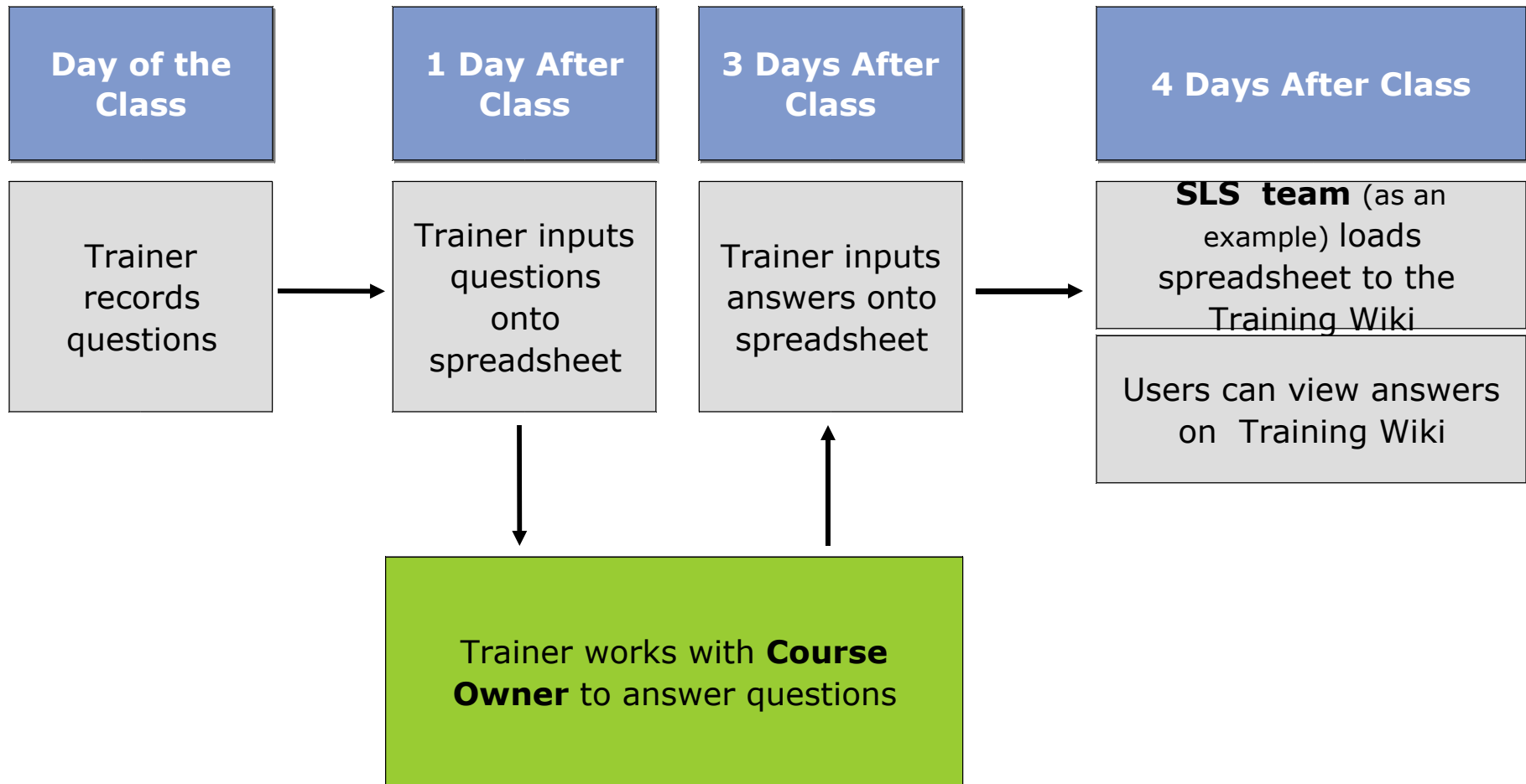
Parking Lot Strategy

Answering End User Questions

- End users typically ask questions that fall into three categories:
 - Business Process – “Why are we doing this?”
 - Transaction – “How do we do this?”
 - Design – “Why does Oracle function like this?”
 - Trainers are not expected to be able to answer every question
- It is ok to ‘punt’ questions and list them in a Parking Lot
 - Parking Lot questions will be answered by Course Owners
 - Answers will be posted to the Oracle website



Parking Lot Questions



Preparing for Training Delivery

Preparing for Training

- A good trainer is a prepared trainer!
 - In order to provide quality training, a trainer must plan and prepare
 - There are day-to-day training tasks that must occur prior to every training session

90% of your success depend on your preparation!

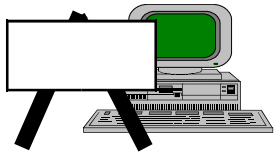
Course Preparation



Meet with co-trainer(s)



Review / tailor material



Learn equipment

Check facilities

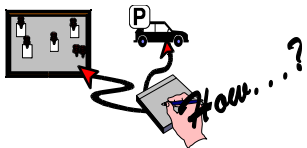


Set Agenda

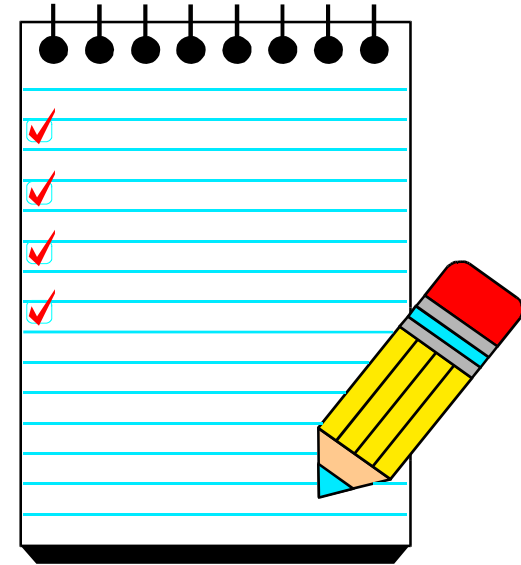
Manage time



Test Data



Prepare Bulletin board / parking lot



Training
Preparation Checklist

Review Material

- Learn and understand all materials, demonstrations, and exercises before class
- Personalize your instructor guide
- Practice before your “Go Live” session



Tailor the Course

- Know your audience and fit the content to their needs
- Delete “nice to know” material and concentrate on core information
- Time the course to determine fit

Delivery Estimates:

Presentation - 1-3 minutes per slide

Demonstrations - 15 minutes

Exercises - 15-20 minutes



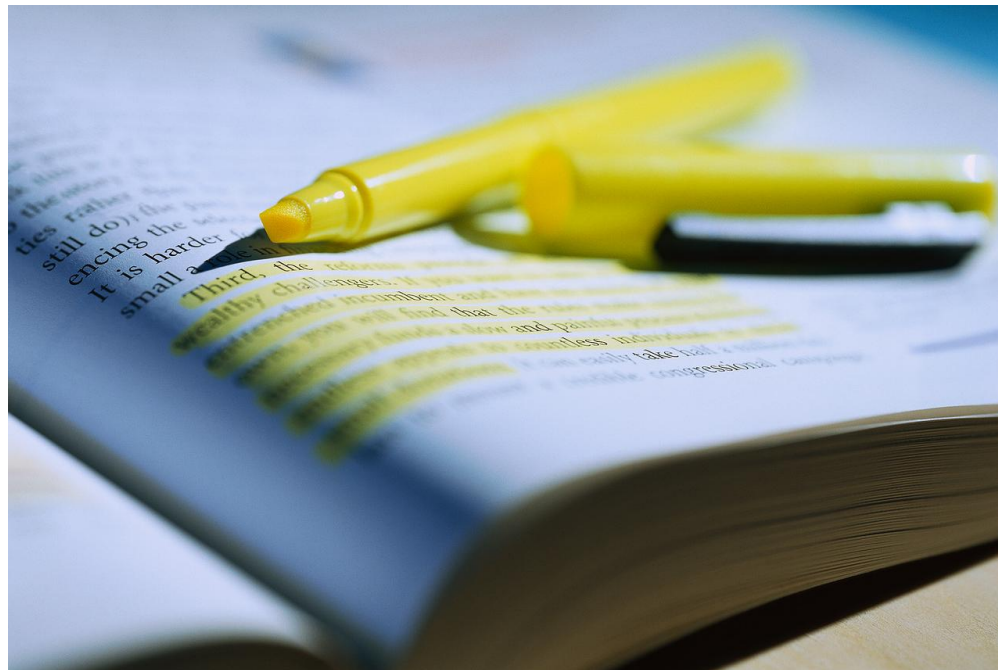
Learn / Check Your Equipment

- Become familiar with the classroom equipment
 - Projection system
 - PC for in-class presentations and demonstrations
 - Flip chart or white board
- Check your equipment
 - Electronic files with course materials
 - Computers, projectors, etc.
 - Connections and access
- Check the participants' equipment
 - User IDs and passwords
 - Oracle connections
 - Training materials and data
- Confirm logistical arrangements



Prior to the First Day of Training

- At least one day before class:
 - Ensure that an adequate supply of training course material is on hand for your class
 - Ensure that all supplies are in the classroom (markers, flipcharts, etc)
 - Make sure you have the class roster



The Day of Training

- Day of class (before participants arrive):
 - Arrive in classroom at least one hour before the course
 - Check e-mail for any course updates or changes
 - Review the training client assignment for the class
 - Turn on all computers, check for course evaluation tool
 - Verify that all computers are in working order
 - Log into Oracle on the instructor's machine to ensure the network and client are operating
 - Test the projector to ensure that it is working
 - Ensure that an adequate number of chairs are in the room for the number of participants (check against attendance list)
 - Distribute course materials
 - Check for tools such as flip charts, marker pens, etc.
 - Place the roster out for participants to sign-in
 - Greet participants as they arrive

How Do I Begin a Training session?

- Beginning a training session:
 - Welcome and Introduction
 - Introduce yourself and what function you are from
 - Briefly discuss your involvement with the Project
 - Ask participants to introduce themselves
 - Administration
 - Provide logistical information (i.e., bathrooms, vending machines, etc)
 - Ensure all participants have signed the class roster
 - Set the ground rules
 - Establish break and lunch times
 - Mention the importance of returning on time
 - Introduce the parking lot
 - Request that participants refrain from asking questions that relate to design issues
 - Remind participants they are not there to offer design change suggestions

During the Course of Training

- During a training session:
 - Discuss the training material
 - Follow your trainer notes for each course
 - Stick to your objectives and keep moving
 - Present all slides and simulations
 - Complete all simulations
 - Write down parking lot questions
 - Ensure all participants have signed the roster
 - Ensure that each participant completes a Course Evaluation



Tools & Logistics

Training IDs and Support

■ Training IDs:

- The facilitator will receive information regarding Training IDs and Oracle instance support from the SLS training team prior to each training session they deliver.
- Generally, a training ID will be assigned to each participant and trainer.
- The responsibilities assigned to the training IDs may not necessarily reflect the responsibilities that the individual will have in production as generic training IDs will be used most of the time.

■ Support:

- An ALIAS will be created for any questions that the facilitator may have.
- Weekly calls will be set up with Business Unit Training Manager's to provide a venue for questions.

Logistical Issues to be aware of

- Contact your Business Unit Training Manager for details on:
 - What is the process to invite/register attendees for classes you will deliver?
 - Where to get the confirmed list of attendees?
 - Who will confirm the room booking for your session?
 - What to do with the sign-in sheet at the end of the class?
 - Who will print and deliver training materials?
 - Who will provide evaluation forms and what to do with completed evaluation forms at the end of the class?
 - Who you can contact during the session for support on the training instance and classroom

Questions and Answers

Thank you!

Exercise

Please prepare the following:

a 3-minute introduction to a training course, or a section of a training course which you would like to deliver



You have 30 minutes preparation time.

You will receive feedback from the audience!