

Training Delivery Problems and Solutions*

The authors surveyed 371 trainers who were asked to recall training delivery problems or difficulties they experienced as novices. The analysis of their 1,098 responses conclude that novice trainers faced 12 common training delivery problems. Twenty expert trainers were subsequently surveyed and asked to present successful strategies for dealing with the 12 training delivery problems. The analysis of their responses concludes with a synthesis of the common training delivery problems experienced by novices and the experts' advice on how to solve these problems.

The training of employees at all levels has taken on a significant role in industry and business. Rapid technological advances in the workplace and the corporation's concern for profit in today's marketplace drive the emphasis on training employees. When properly used, training increases both the effectiveness and efficiency of employees (Swanson, 1992). Within this framework and with all the advances in instructional technology, instructor-led training still remains the most popular method of delivering training, year after year, according to Lakewood Research's annual census.

Most beginning trainers are not graduates of programs specifically designed to train trainers. They are generally subject-matter experts

*Richard A. Swanson and Sandra K. Falkman (1997). *Human Resource Development Quarterly*, vol. 8, no. 4, Jossey-Bass Publishers.

in their organizations and have good communication skills. Their preparation to deliver training often follows a “see and do” model. That is, they observe the course in preparation to deliver it and then they teach the course to other employees in a manner similar to what they observed.

Criticism of the training profession has included the lack of research about the processes used to select instructors, the evaluation methods used to rate the instruction, and the evaluation methods used to rate the instructor (Swanson, 1982). As training in industry and business continues to increase, the body of knowledge possessed by expert professional trainers will need to be captured and shared with more employees in organizations (Jacobs, 1992).

PURPOSE OF THE STUDY

Little has been written about the ways in which expert trainers handle specific training delivery problems in the training classroom. Proven and practical techniques for dealing with specific training delivery problems would help novice trainers.

There were three purposes for this research: (1) to determine the difficulties novice trainers experience during the delivery of training, (2) to gather reports from experts on how they handle such situations, and (3) to synthesize this information into a useful aid that defines the training delivery problems and provides specific solutions.

OVERVIEW OF THE LITERATURE

Training and development has grown dramatically during the past three decades. It has become a \$30 billion profession. Each year, 15 million employees participate in 17.6 million courses. One out of every eight American workers attends a formal training course every year (Chakiris and Rolander, 1986). Furthermore, more employees each year are finding themselves in the role of trainer without having adequate preparation.

The burden for understanding and mediating the organization's desire for expertise and meeting the learners' needs is ultimately left on the trainer's shoulders (Yelon, 1992). The research on training adults in the workplace typically focuses on the needs of the organization (Sleezer, 1992) and the learner (Knowles, 1984a). Much less is known and said about the specific problems facing the novice

trainers and their role in delivering instruction. Instructor skills are the skills needed by a trainer when using structured learning events, such as group discussions, presentations, role-plays, and case studies. These skills also include assessing learners' needs, using media and materials, administering exams or instruments, and providing feedback to participants (McLagan, 1983).

General models of training and learning are important to the profession, as are the problems that threaten and discourage practitioners. At the general level, Knowles (1984a) suggested that four concepts can be used to think about adult education: (1) the self-concept of the learner, (2) the learner's experience, (3) the learner's readiness to learn, and (4) the learner's perspective of time. Smith's (1983a, 1983b) more specific review and synthesis of the instruction literature identifies those variables that affect training and that the trainer can control. They include objectives, content structure, instructional sequence, rate of delivery, repetition and practice, knowledge of results, and reinforcement and rewards.

Furthermore, the selection of instructional approaches depends on many criteria, such as conditions of learning, content, and characteristics of the students. Gagne (1987) specifically cites eight variables: gain attention, inform the learner of the learning objectives, stimulate the recall of prerequisite learning, provide learning guidance, elicit performance, provide feedback about performance correctness, assess performance, and enhance performance and transfer.

Zemke and Zemke (1988) have further defined the specific needs of adult learners. The following are some examples: (1) in a classroom training situation, it is important that the environment be comfortable, both physically and psychologically; (2) trainers must understand the participants' expectations of the course, because the self-concepts of the participants are involved, and (3) by serving as a facilitator or orchestrator, the effective instructor can manage the classroom by allowing participants to share their experiences and knowledge, can integrate new knowledge, and can provide strategies that will allow transfer of learning back to the job.

Clearly, the job of instructor is complex. And, while general instruction theories abound, the bulk of the practitioner training delivery advice in the literature is not grounded in research (see Pike, 1989). From the literature it is difficult to cull out the common training delivery problems and expert solutions to those problems being faced by novice trainers.

METHODOLOGY

The general methodology of the study involved surveying novice trainers and expert trainers. The novice identified their training delivery problems and the experts provided solutions to those problems. An overview of the general research methodology for this study is:

1. Survey trainers to determine the most frequent training delivery problems that novice trainers experience.
2. Analyze survey data and synthesize results into 10 to 15 major delivery problems.
3. Identify experts to respond to major training delivery problems experienced by novice trainers.
4. Survey the training experts through a questionnaire as to how they handle the identified training delivery problems.
6. Prepare job aids, listing the training delivery problems, general solutions, and specific solutions.
7. Prepare the final report.

SURVEY OF NOVICE TRAINERS

A questionnaire was developed to determine the training delivery problems most frequently encountered by novice trainers. Questions covered basic demographic information and problems the respondents encountered during their first two years on the job. The following open-ended question was used:

As a beginning trainer, what problems or difficulties did you encounter during the delivery phase (or presentation) of training. Please be specific and feel free to use the other side of this questionnaire.

The first draft survey questionnaire was pilot-tested with 25 students in a University of Minnesota graduate-level training class and then revised. The final questionnaire was then sent to the 984 members of the Southern Minnesota Chapter of the American Society for Training and Development. Of the 984 forms that were mailed, 420

(43%) were returned. Some of the returned forms were unusable for various reasons (e.g., blank, problems not listed, returned too late). The 371 (38%) usable questionnaires provide the data for the analysis. A list of 1,098 training delivery problems was derived from the 371 usable questionnaires.

Each of the 1,098 training delivery problems was printed on a note card and sorted into categories. The method used for sorting the data is known as the KJ Method: Affinity Diagrams (Mizuno, 1988). This method, developed by Kawakita Jiro of the Kawakita Research Institute, is used to analyze data that are elusive, confusing, and disorganized. Groupings are made by mutual affinity of the data. The process has seven steps: (1) choose a theme, (2) collect the data, (3) put data onto cards, (4) sort the cards into categories, (5) label the cards, (6) draw the diagrams, and (7) present the data.

Essentially, the technique is a right-brain process (Mizuno, 1988). Those involved in the sorting were directed to use their intuition and creativity to interpret and group the data, as opposed to sorting by rigid analysis and reasoning rules. Nine people were involved in the sorting process: two university professors, six graduate students, and one professional trainer. The four sorting teams worked in three pairs and one triad. Each expert team, A through D, was given one-fourth of the cards. In their A, B, C, and D teams the cards were read slowly, once or twice. Cards that contained similar ideas were grouped together on the basis of their affinity or commonality. After the cards had been grouped, the groups were labeled. The label consisted of words written on a blank card that conveyed the meaning of the cards in that group. The labeled groups of cards are then treated as a single card (Mizuno, 1988).

The 12 training delivery problems fell into three basic categories: (1) those pertaining to the trainer, (2) those describing how the trainer relates to the trainees, and (3) those pertaining to presentation techniques.

SELECTION OF EXPERTS

A variety of distinctions can be drawn between novices and experts. The major differences are intellect and experience. Because experts have a broader knowledge base than novices, they solve problems in a different manner. Experts have more focus, recognize cues that

allow them to recall “chunks” of information, and are better able to integrate and interconnect knowledge. The knowledge that novices possess may be descriptive at a superficial level. In contrast, experts are able to troubleshoot and make interpretations about information. By using cues to access the stored knowledge they possess, experts are able to assess their situation at hand and devise an action plan that will work effectively (Thomas, 1988).

The goal of this aspect of the project was to establish a list of such experts in the field of training, specifically those who had distinguished themselves through their outstanding delivery skills. Once identified, these experts were presented with a list of the 12 most common training delivery problems faced by novice trainers as identified through the first survey. The experts were asked to respond to the problems with specific techniques they use to overcome similar problems during training presentations.

The potential experts were to be practitioners having a minimum of two years of experience and recognition by either colleagues or academicians as successfully trainers. A nomination form was sent to the eight officers of the Southern Minnesota Chapter of the American Society for Training and Development to obtain names of experts. The 12-member Training and Development Faculty at the University of Minnesota were also asked to nominate experts. Both groups were sent an identical form on which they were requested to nominate up to six people whom they considered to be expert “deliverers” of training. They were asked to provide the company name, address, and telephone number of the nominees. Three association officers responded and provided 15 names. The survey of the university faculty produced six responses and 28 names. The total of 43 names was reduced to 36, because of duplication.

SURVEY OF EXPERTS

Questionnaires were sent to the 36 people who were identified as experts in delivering training. They were asked to respond to the 12 training delivery problems that had been identified as problems for novice trainers in terms of how they handle these problems.

Twenty (56%) surveys were returned. Most of the experts responded in detail to all of the questions. These responses were typed and sorted into categories. Similar responses were grouped

using the KJ Method. The three or four solutions that appeared most frequently for each difficult training situation became the basis for the final list of solutions from the experts.

ANALYSIS OF DATA

The primary data analysis revolved around the 1,089 training delivery problems of novice trainers collected through the survey questionnaire. A composite list of 12 to 15 general training delivery problems had been compiled when the four teams of experts had finished sorting their portion of the problems according to the KJ Method. Enroute, each team wrote its list on a chalkboard, explained the problems to the other teams, and defended the rationales behind the problems. A matrix was developed to synthesize the topics into 12 training delivery problems.

The final list that emerged contained the summaries of the training-delivery-problem information collected by the first survey. The purpose of the first survey was to determine the major delivery problems of beginning trainers. The synthesis of this analysis resulted in the “Twelve Most Common Training Delivery Problems of Novice Trainers.”

The purpose of the second survey was to have experts propose solutions for handling these problems. It resulted in the “Expert Solutions to the Twelve Most Common Delivery Problems of Beginning Trainers.” Essentially, it is a topical outline that synthesizes the solutions from the 20 experts against the 12 training delivery problems that novices experience. The combined data from the two surveys are presented here.

1. FEAR

- A. *Be well prepared.* Expert trainers have a detailed lesson plan, understand the material, and practice their presentation.
- B. *Use ice-breakers.* Experts use ice-breakers and begin with an activity that relaxes participants and gets them to talk and become involved.
- C. *Acknowledge the fear.* Experts understand that fear is normal, confront what makes them afraid, and use positive self-talk or relaxation exercises prior to the presentation.

2. CREDIBILITY

- A. *Don't apologize.* Experts are honest about the subject matter and explain that they are either experts or conduits.
- B. *Have an attitude of an expert.* Experts are well prepared and well organized. They listen, observe, and apply what they know to what the participants know.
- C. *Share personal background.* Experts talk about their areas of expertise and the variety of experiences they have had.

3. PERSONAL EXPERIENCES

- A. *Report personal experiences.* Experts tell their personal experiences, sometimes asking themselves problem questions to uncover them.
- B. *Report experiences of others.* Experts collect pertinent stories and incidents from other people and/or have participants share their experiences.
- C. *Use analogies, movies, or famous people.* Experts use familiar incidents or situations in order to relate to the subject.

4. DIFFICULT LEARNERS

- A. *Confront problem learner.* Experts use humor. They may also talk to the individual during a break to determine the problem or to ask the person to leave.
- B. *Circumvent dominating behavior.* Experts use nonverbal behavior, such as breaking eye contact or standing with their backs to the person and inviting the others to participate.
- C. *Small groups for timid behavior.* Experts find that quiet people feel more comfortable talking in small groups or dyads. They structure exercises where a wide range of participation is encouraged.

5. PARTICIPATION

- A. *Ask open-ended questions.* Experts incorporate questions into the lesson plans and provide positive feedback when people do participate.

- B. *Plan small group activities.* Experts use dyads, case studies, and role-plays to allow people to feel comfortable, to reduce fears, and to increase participation.
- C. *Invite participation.* Experts structure activities that allow people to share at an early time in the presentation.

6. TIMING

- A. *Plan well.* Experts plan for too much material, and some parts of the material are expendable. They prioritize activities so that parts may be deleted, if necessary.
- B. *Practice, practice, practice.* Experts practice the material many times so they know where they should be at 15-minute intervals. They make sure there's a clock in the training room.

7. ADJUST INSTRUCTION

- A. *Know group needs.* Experts determine the needs of the group at an early time in the training and structure activities and processes based on those needs.
- B. *Request feedback.* Experts watch for signs of boredom and ask participants either during breaks or periodically during the session how they feel about the training.
- C. *Redesign during breaks.* Experts find it helpful to have contingency plans and, if necessary, to redesign the program during a break. Redesigning during delivery is not advocated.

8. QUESTIONS

Answering Questions

- A. *Anticipate questions.* Experts prepare by putting themselves in the participant's place and by writing out key questions learners might have.
- B. *Paraphrase learners' questions.* Experts repeat and paraphrase participants' questions to ensure that everyone has heard the question and understands them.
- C. *"I don't know" is okay.* Experts redirect questions they can't answer back to the group's expertise. They try to locate answers during breaks.

Asking Questions

- A. *Ask concise questions.* Questions are a great tool for experts. They ask concise, simple questions and provide enough time for participants to answer.

9. FEEDBACK

- A. *Solicit informal feedback.* Experts ask participants, either during class or at the break, if the training is meeting their needs and expectations. They also watch for nonverbal cues.
- B. *Do summative evaluations.* Experts have participants fill out forms at the conclusion of training to determine if the objectives and needs of the group were met.

10. MEDIA, MATERIALS, FACILITIES

Media

- A. *Know equipment.* Experts know how to fully operate every piece of equipment that they use.
- B. *Have back-ups.* Experts carry a survival kit of extra bulbs, extension cords, markers, tape, etc. They also bring the information they are presenting in another medium.
- C. *Enlist assistance.* Experts are honest with the group if there is a breakdown and ask if anyone can be of assistance.

Material

- A. *Be prepared.* Experts have all materials ready and placed at each participant's workplace or stacked for distribution.

Facilities

- A. *Visit facility beforehand.* Experts visit a new facility ahead of time, if possible, to see the layout of the room and to get an idea of where things are located and how to set up.
- B. *Arrive early.* Experts arrive at least one hour in advance to ensure enough time for setting up and handling problems.

11. OPENINGS AND CLOSINGS

Openings

- A. *Develop an “openings file.”* Experts rely on the many sources for ice-breaker ideas. Through observation and experimentation, they develop ideas and keep a file of them.
- B. *Memorize.* Experts develop a great opening and memorize it.
- C. *Relax trainees.* Experts greet people as they enter, take time for introductions, and create a relaxed atmosphere.

Closings

- A. *Summarize concisely.* Experts simply and concisely summarize the contents of the course, using objectives or the initial model.
- B. *Thank participants.* Experts thank participants for their time and their contributions to the course.

12. DEPENDENCE ON NOTES

- A. *Notes are necessary.* Experts recognize that no one completely outgrows the need for notes.
- B. *Use cards.* Experts scale down their presentations to an outline or key words, which they write on note cards to use as prompts.
- C. *Use visuals.* Experts make notes on frames of transparencies and on their copies of handouts.
- D. *Practice.* Experts learn the script well so they can deliver it from the keyword note cards.

SUMMARY

This study had three major focuses: (1) to determine what trainers considered to be the most frequent training delivery problems they faced as novices, (2) to determine how experts respond to these problems with solutions they have found to be effective, and (3) to present the findings in a useful manner for practitioners. The conclusions from each of the two distinct surveys within the study formed the

research base for the major outcomes—the 12 most common training delivery problems novice trainers experience and expert solutions to these problems.

Although advice and speculation abounds about best practices in training, little research is available about the practical problems novice trainers face. Other novice trainer problems should be researched following the general methodology of this study. They should pursue a specific and/or narrow frame of questions and use open-ended questions, which will likely result in excellent responses from both novices and experts. The resulting researcher's problem of dealing with large pools of qualitative data is lessened with new analysis methods such as the KJ Method.

Given the theory-to-practice gap that haunts the training profession, the general novice-expert methodology used in this study may be helpful in closing that gap.

REFLECTION QUESTIONS

- 18.1. In your experience, what have been some of the instructional delivery problems of new instructors?
- 18.2. Of the 12 training delivery problems, which 2 do you think are most difficult to overcome?
- 18.3. For the two problems noted above, discuss the implementation of the specific solutions proposed by the training experts.