TRAINING
TODAY

Chicagoland Chapter
ASTD
Linking People,
Learning & Performance

THE MAGAZINE OF THE CHICAGOLAND CHAPTER OF THE

AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT

Letter from the Editor
Instructional Design

Maybe you've trained the same skills using the same training method for so long that you're wondering if there isn't a better way. Maybe you want to re-design your training to keep up with the times, or to work with your company's new branch in Singapore. Maybe you've just been thrown into a position of needing to design training, and could use some quick tips…or you've been introduced to new e-learning technology at work and are suddenly expected to be an expert at designing it. Maybe you're an experienced instructional designer who wants to know what others are doing and saying. Or maybe you're just curious about instructional design. Any direction you're coming from, this expanded online edition of *Training Today* is for you.

Our lead article, Instructional Design for Multicultural Audiences by Randall Stieghorst and Monica Francois Marcel, presents a myriad of considerations relevant to designing training for multi-cultural audiences, both at home and abroad. Our strategic training column is an interview on instructional design with Veronica Bruhl, Ph.D., a past president of CC-ASTD.

Next, OD specialists Therese Yaeger and Peter Sorensen have teamed up with co-author Philip Anderson to discuss corporate culture as it relates to strategic planning, the prerequisite to instructional design. Then, Peggy Steele and Kevin Himmel highlight a number of useful techniques for instructional design in e-learning as they challenge low-risk training methods. In our Best Practices column, Dearborn Press author Florence Stone approaches the topic of instructional design from the point of view of how you, as a trainer, can design your own ongoing self-instructional training plan. Two more articles round out the issue: Mark Steiner drills down on how to apply specific techniques; and Jim Accetta explains practical instructional design techniques in the instructor-led training world. If you're looking for techniques to grab onto and use immediately, you'll find them here.

—Karen Bolek

Editor's Note:

In our Summer 2004 issue, Scott Roubeck's article, "The Delicious Side of Service," was followed by an e-mail address for Scott that is no longer in use. Scott can now be reached at: sroubeck@tollegroup.com. Our apologies to Scott for the error!

Instructional Design for Multicultural Audiences

Adapting instructional design methods and principles for multicultural audiences at home and abroad

By Randall Stieghorst and Monica Francois Marcel - With research assistance from Daniela Talmelli

Designing an effective training is an art, not a science. In today's world of instructor-led, computer-based, and self-directed trainings—and all the blended solutions in between—an instructional designer must strike a delicate balance between the learner's needs, expectations in a learning environment, and the myriad of methodologies and technologies to enable that learning.

Add cultural differences to the training mix and it becomes an even more complex task, as the instructional designer may no longer be certain of the learner's needs and expectations in a learning environment. Such differences are present not only in international locations but often right here at home in what has become a culturally diverse American workforce.

Understanding culture and its impact on instructional design allows designers to leverage this knowledge and improve the overall success of both domestic and international learning initiatives, whether starting at square one with a new tool or modifying (*localizing*) an existing tool.

How learning behaviors vary across cultures
When we consider different *cultural learning styles*, we are not considering the array of cognitive learning styles such as those outlined by Kolb[1], but rather the needs and expectations that are unique across cultures.

The *cultural iceberg* is a metaphor for understanding cultural differences. Behaviors, such as those observed in the classroom, are merely the "tip of the iceberg" and reflect a deeper set of values and attitudes that lie further below the surface. These values and attitudes are instilled – and reinforced – by institutions such as the family, societal norms, and the educational system the learner grew up in.

Tina Thompson, Director of Learning and Development with Applied Systems, comments: "People come into the training thinking that what they value will be the same as what their co-workers and team value. They're from different generations, different backgrounds, and bring different experiences. The learners themselves realize that,

'Wow, we don't have many of the same values and we see things differently…and that's actually great! It enhances our work to bring different viewpoints to the table.'"

Some of the key cultural values with impact in instructional design include hierarchy, collectivism, formality, relationships, and high context communications.

Hierarchy:
A culture that values hierarchy believes that people are not always "equal" in every situation, be it for the status ascribed to their position in the organization or society, or for their achievements. This inherent "distance" between people valuing hierarchy is seen as normal and often desirable. Roles are thought to provide order and one is assumed to be trustworthy and credible only when one understands his/her role compared to others. Thus, a learner who values hierarchy may not be comfortable with an instructor who, rather than demanding respect for his position and experience as a trainer, attempts to be "an equal." Similarly, learners who find themselves in a classroom with their superiors may be uncomfortable interacting with those superiors, whether participating in a learning activity together or in a large brainstorming session. It is important to note that the superiors will feel equally uneasy in this environment. Cassandra Sheffield, a General Education Instructor at a downtown Chicago college, remembers just such an example, "Once, my 'I'm at the same level as you are' approach backfired on me. The students were looking for someone who was more of an authoritative figure and [they] didn't respond well to the self-directed learning. I had to learn when to step up to more of an authoritative role."
Example ID implication: *What type of interaction are you expecting in the group dynamic? Do the learning activities involve extensive group interaction in what will likely be a "mixed" group? Is the trainer's role explicitly defined as "facilitator" rather than "instructor"?*

Collectivism:
A culture that values collectivism sees the group as a whole as being more important than each individual member. Success is group success, not personal success. Group harmony is critical.

Those who act with only their own interests at heart and those who stand out from the group are not respected and generally ineffective. A learner who values collectivism considers herself a part of the classroom group and may be uncomfortable in planned training activities that require her to "stand out" or "show off." Kathy Orms, Director of OD with Loyola University Medical Center comments, "Americans are open and friendly and want to share things about themselves right away. That doesn't always happen in other cultures, so if you want it, you've got to start with low-threat activities and very gradually work up to a point where each person fully participates by himself."
Example ID implication: *What level of individual performance are you expecting in each training module?*

Formality:
A culture that values formality believes that certain situations require certain protocols. A learner who values formality will expect the trainer, and the training materials, to have a certain level of professionalism. Any informality in the learning environment may be seen as a lack of professionalism. Mickey Steffeny, Communication and Training Coordinator with Archer Daniels Midland, understands this dimension very well: "In one of our first trainings in Europe, we used a baseball theme, just like our domestic training. We took it over and received a less-than-warm reception to using such an informal American theme. We have had to backpedal to regain credibility."
Example ID Implication: *Are the themes of the learning tool sufficiently professional? Do the materials reflect the importance of the training?*

Relationships:
A culture that values relationships sees human interaction as more important than the impersonal task we find ourselves charged with. A learner who values relationships will see the instructor and his fellow learners as more important than any time constraints, task requirements, or impersonal rules and regulations. They may also consider the relationship so important that they do not see the "benefit" of explicit and overt peer criticism.

Instructional Design for Multicultural Audiences (con't)

The concept of "saving face" (avoiding embarrassment for you and for those around you) demonstrates the ultimate importance of maintaining harmonious relationships. Christine Swanstrom, a Sr. Instructional Designer with United Airlines, explains the importance of relationships with audiences overseas: "We expanded a 2-day training to 3 days. As we progressed through the program's 3 days, we added more group activities…by the end, large group discussions and sharing were part of the norm of the class. I believe this was due to the continuous relationship building that was a part of the design of the class."

Example ID implication: Is the training schedule too rigid to accommodate changes, which may arise out of the training class' relationship (i.e., discussions, etc.)? Are learners expected to give each other feedback? Do role plays or activities require participants to "lose face," albeit only simulated?

High Context Communication:
A culture that values high context communication believes that the *way* we communicate often carries more meaning than just the words themselves. A learner who values high context communication will expect the trainer to speak holistically and avoid paring every concept down to the most basic explanation. They may also expect discussions to be broader and deeper. Reeti Nair, President of Aligna, Inc., comments, "People who are raised in a low context culture want to drive right to the bottom line. People from high-context cultures want to first talk about the abstract – the esoteric – before actually getting into the meat of it. When designing training, you've got to meet the needs of both groups."

Example ID Implication: *How much time is built into the training for discussion? Are explanations and dialogs too brief? Is sufficient background information presented to satisfy a high context learner?*

Considerations for culturally-aware instructional design
Adapting a training for a *multi*-cultural audience is significantly more difficult than adapting it for a discrete cultural group such as those found at international locations. Many of the following considerations for ID are applicable in both situations. While some may argue the inefficacy of attempting to assume a different cultural viewpoint when doing ID work, in a world of limited resources and options, it often remains as the most practical and viable method for building learning tools for diverse learners. [2]

The process of modifying the instructional design process to incorporate cultural considerations requires a focus on many stages in the design process. While we have outlined considerations for many aspects of the training, not every area needs to be considered in every case. Informational and awareness-building modules, for example, may require few modifications aside from trainer selection and preparation. Skill-building and motivational modules, on the other hand, may require significant modifications.

Needs Analysis
Do investigative techniques used with the average American work as effectively in the target culture? For example, are workers as willing to readily admit areas of weakness or areas of improvement because it would cause them to lose face? Does your point of contact for the needs analysis understand her learners' *cultural* learning styles?

Objective Setting
How will target culture trainees react to the types of objectives you have designed? Do purely behavioral objectives lack any "theoretical understanding" imperative to cultures that consider training an opportunity for both thinking and acting? Do your objectives threaten trainees with "failure" if they are not able to fully meet the competencies?

Testing & Evaluating Performance
Do your methods for evaluating achievement take cultural differences into consideration? For example, peer evaluations of post-learning performance in the classroom may be ineffective if peers are not able to provide proper constructive feedback or are unable to criticize and judge their peers (face-saving).

Content
Does the content reflect local behaviors, norms, and attitudes? For example, does your sales training speak specifically to local selling practices and expectations from clients/consumers? Do your case studies reflect the actual environment in which the trainees function? Tina Thompson has her own strategy for adapting international content: "I educate myself on local events and culture and intertwine their current events into the lessons. They love it when they see we're trying to tap into their realities."

Format
Do your methodologies put participants into uncomfortable situations? Are you asking line and managerial workers to collaborate or even switch roles to achieve a level of empathy, despite a hierarchical cultural attitude? Do your role plays go against the concepts of "conflict avoidance" common in many Asian cultures by asking participants to simulate a confrontation?

Materials
Do the materials reflect a multi-cultural perspective? Do the images, graphics, and scenarios reflect the target culture? Images of wholly-Caucasian American families or a wholly-Chinese workforce will immediately seem foreign to people from Africa or the Middle East and may diminish their faith in the training events' applicability for them.

Delivery
Does your delivery method speak to all participants? A trainer unfamiliar with local training norms may be unable to diagnose problems or, even worse, may misdiagnose situations leading to further problems.

Evaluation
How does the target culture treat the evaluation, and therefore how do we interpret the results? While some Americans may be openly critical of each other, Thais may give everything a 10 to avoid criticizing or embarrassing anyone (including the trainer). Are there methods for soliciting comments and evaluations in a less formal, yet structured, way?

Who needs to be involved?
It is not always possible, as instructional designers, to be cultural experts as well. Relying on the trainer to improve the training during the delivery phase is not always effective. The best approach is to incorporate cultural aspects directly into the training design phase.

When possible, consulting with target-culture HR professionals will allow you to identify areas of strength and weakness in your training strategy, from initial needs analysis up through evaluation. At United Airlines, Christine Swanstrom notes, "We were expanding globally, so we brought in external cultural consultants to look at our training from a theoretical perspective, while leveraging our own international SMEs for the direct application to job tasks."

Another option is to test the learning tool with a diverse focus group. According to Mickey Steffeny, "In a perfect world, I could pull together a cross-cultural and cross-sectional focus group to find where the gaps are in my training." Reeti Nair also includes target trainees in the process and asks, frankly, "Where would you feel uncomfortable?" Ray Narducy, the manager of OD for Ace Hardware, uses the principle of buy-in by having others involved in creating the training. "We get supervisors involved in the training design and ask what will work and what won't work for their group." Kathy Orms uses a similar process: "I find the perceived leader of the training group, as well as the 'named' leader, and include them both in the assessment and planning sessions."

The localization of a training is most easily accomplished with the advice and input of the diverse group, but you may also benefit from various others, including:

Translator:
If materials are for non-English speakers, all training materials may need to be translated. This translation must be done by an experienced translator; using bilingual colleagues unskilled in translation can result in extra hours of effort and a poor adaptation, which may or may not capture the essence of the training.

Cultural Subject Matter Expert (SME):
The Cultural SME understands the behaviors and attitudes of the target culture and can provide input and feedback regarding proposed adaptations. External cultural consultants experienced with training are one source of cultural SMEs. In addition, internal focus groups and key contacts can also provide insight. One caveat, according to Mickey Steffeny, is, "Don't assume that a secretary is going to be capable of evaluating a training for managers."

Local Content SME:
In cases where part of the localization includes localization of content, you may need a local SME to provide you with the appropriate content.

Local Trainer:
The local trainer is a training professional with experience in the local culture and with an ability to understand your needs and expectations. If outsourced, you may need to bring the trainer up to speed on your organization's specific approach to the training content.

Adapting an existing learning tool
Adaptation may also take place after design is complete. The term *localization* is most often heard in the context of consumer products, especially software, which are adapted for export to foreign markets. Through the process of localization, the product's design specifications and functionality, among other things, are adapted to meet local user needs in the target market. Similarly, *training localization is the process of adapting a training originally designed for (and by) one cultural group for delivery to another cultural group*.

The extent of adaptation needed in a post-design localization is variable. It may include modifications to any or all aspects of the training including learning objectives, methodologies, content, and cases and specific examples; it may also take the form of translation and/or delivery modifications.

The Business Case
If the ultimate role of a good instructional designer is to create an effective learning tool, the qualitative benefits of adapting the design to a distinct cultural group's needs are threefold. First, the trainees are better off because they are able to acquire the knowledge and skills more effectively. The organization is better off because its learning goals are met for more learners. Lastly, we as instructional designers are better off because we have designed a more successful training that reflects our best efforts.

Unfortunately, instructional design for multicultural audiences typically requires additional resources. Convincing management of this need for more flexible time or budget constraints is not always an easy task.

Figure 1 allows you to conceptualize the qualitative benefits of a localized versus an unadapted domestic training. Note that as the target audience's culture becomes increasingly different, the domestic version of the training provides lower results (be they measured in effectiveness, satisfaction, or financial impact). A localized version, while never reaching maximum effectiveness/satisfaction, as might be created by instructional designers native to the culture, allows you to maintain a markedly higher level.

The only point at which either of the trainings theoretically achieves maximum

effectiveness is when delivered directly to those who hold the same cultural values and learning environment norms as the designers. Regardless of the extent of localization, a localized version can only approach maximum effectiveness because there are always aspects of the original training design that are inherently different. Even a training designed by Americans for Americans at an American organization will lose a degree of effectiveness if presented to a neighboring organization where the organizational culture may be slightly different. A training that is effective at Apple may have a different impact on the same type of trainees at Microsoft. This difference is magnified when the differences are life-long cultural values. Estimating the level of cultural difference is not always easy, and most trainers and instructional designers often *underestimate*—particularly when they are unfamiliar with the differences that exist between learners of different cultures.

In addition to any hard criteria that may be established by training and development departments, other benefits can be expected from localized training. Most importantly, you can expect improved morale of local groups, who now feel the training is "theirs" and not simply an "import from headquarters."

However you measure ROI, the basic presumption is that the short and long-term benefits of the training outweigh the current costs to the organization. A successful training initiative provides value to the organization in the form of additional knowledge and skills that contribute to improved performance. It would be erroneous to assume that a training designed for one cultural group would have the same impact as that designed for another. Without the same impact, any numeric figures used to represent the "benefit" to the organization would be overstated and thus ROI would be overstated. Adapting the process allows us to regain that value by regaining the desired impact.

Similarly, costs inherent in the adaptation process also impact ROI. Therefore, any initial evaluations of ROI would need to be adjusted for this increased investment. In summary, the improved effectiveness of the training contributes to a higher **return** while the additional resources and time needed to fully

adapt the training may contribute to a greater **investment**.

Moving Forward

As organizations grow internationally and the American workforce continues to diversify, we as instructional designers and trainers must come to understand and leverage the cultural diversity that surrounds us.

[1] Kolb, D. A. (1984) *Experiential Learning*, Englewood Cliffs, NJ: Prentice Hall
[2] Henderson, Lyn (1996). Instructional design of interactive multimedia: a cultural critique. Educational Technology Research and Development 44 (4), 86-104.

Figure 1

Maximum Expected Results

Localized Version

Benefit

Expected Results

Domestic Version

Cultural Differences
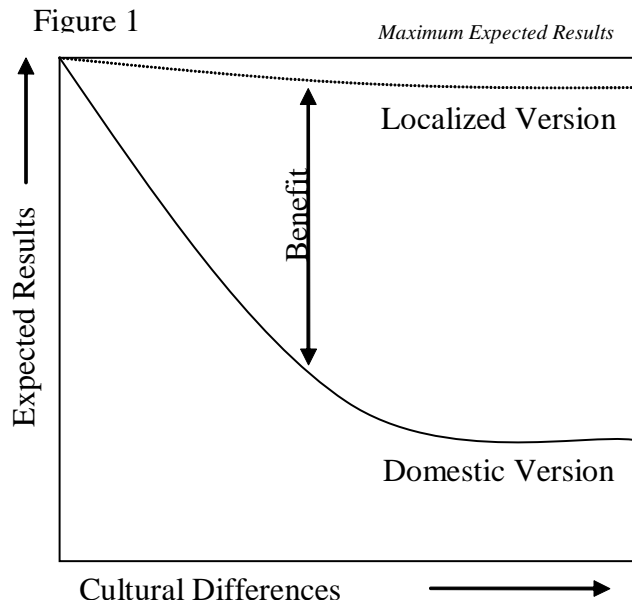
Monica Francois and Randall Stieghorst are partners at Language & Culture Worldwide, LLC. They specialize in helping U.S. organizations develop multi-cultural and global mindsets. Since 2001, they have also managed an annual training localization project for a Fortune500 company, ensuring effective communication of an instructor-led ethics program in Europe, Africa, and the Americas. Randall resides and works in Buenos Aires and Monica is based in Chicago.

Insights in Strategic Training

An interview with Dr. Veronica Bruhl

In this issue CC-ASTD Presidential Advisor Dr. Veronica Bruhl, Staff Instructional Designer for Product Training Services—North America at Tellabs in Naperville, talks of current realities in instructional design in the corporate world.

* * *

Training Today: Veronica, What are some of the current trends in instructional design, and why are they valuable?

Veronica: Trends include reusable learning objects, synchronous training, blended learning, measuring training, and rapid development. Why? Companies want instructional designers to produce the greatest amount of work in the shortest amount of time, and to be able to customize it to the end user.

Training Today: What criteria do you use for selecting outside consultants and for evaluating the design of their programs?

Veronica: At Tellabs, a candidate must have at least a Masters Degree in the instructional design field, and we prefer a telecommunication or technical background. We also look for someone who fits the company culture and can blend in with the other instructional designers and trainers. Other criteria could include web experience, a docent background, and a self-starter. We evaluate the candidate's design by making sure that our process, templates, and procedures are used properly.

Training Today: What advice would you give a new person learning to design training?

Veronica: Three things:
* Network. The training industry can be hard to break into. You need to make sure that people know who you are and will provide references or give you that sought-after job lead.

* Be flexible. Even though there is a process for instructional design, you need to know when to deviate from the process to meet deadlines, but to never decrease satisfaction.

* Vary your experiences. There are companies out there with different types of training and different types of training styles. Try to work in different industries or training fields to get a wide variety of experiences.

Veronica Bruhl may be reached by e-mail at Veronica.Bruhl@tellabs.com or by phone at 630-798-5374.

Understanding Cultural Assumptions in the Strategic Planning Process

Philip T. Anderson
Therese F. Yaeger
Peter F. Sorensen

For this article, Philip T. Anderson has provided an application of an OD and Strategy process being implemented at the Diagnostics Division of Abbott Laboratories, a Chicago-area organization. Our goal is to provide you with a follow-up of this case in 2005. Thanks to Philip for his Abbott contribution.

In 100 B.C., the Chinese Warrior and philosopher Sun Tzu wrote:

> "Those who are victorious plan effectively and change decisively. They are like a great river that maintains its course but adjusts its flow…they have form, but are formless. They are skilled in both planning and adapting and need not fear the result of a thousand battles. For they win in advance, defeating those that have already lost."

Planning, changing and adapting – today, we call that Organization Development. Back in 100 B.C., Sun Tzu knew that in the business of war, the ability to plan strategically and adapt to change meant the difference between life and death. Nowadays, many organizational leaders sound the same battle cry – plan and adapt, or we will suffer serious consequences. The evidence is clear: since 1955, only 71 of 1,877 companies that have made the Fortune 500 list have made it consistently.

Today more than ever, business training that supports significant corporate change requires strategic planning—planning to align the training strategy with winning business results. The question is, how do you design "training to win" in an environment where the rules of the game are constantly changing?

Abbott Laboratories Diagnostics Division

The Diagnostics Division of Abbott Laboratories (ADD) is undergoing a tremendous amount of change, and it is the task of the Training & Organization Development Team to enable employees to change with it. This involves developing a learning strategy in the context of helping the leaders change the culture of ADD.

Much has been written about the role of Organization Development in large-scale change efforts, but little about OD's role in strategic planning. To many, the strategic planning process and organization development are polar opposites; yet a few believe that these two processes have more in common than it first appears. Worley, Hitchen and Ross, authors of *Integrated Strategic Change* wrote, "Traditional business policies and competitive strategy are concerned with understanding when and how to fundamentally alter the organization's strategies, structures, and processes. All organizations at some time must abandon their strategic orientations and reinvent themselves." In other words, strategy often requires organizations to change the way they do business – to abandon what has made them successful in the past and adopt a new way of doing things – to change their culture.

In the training department of ADD, we recognized the wisdom of Worley, Hitchin and Ross' observations. During our strategic planning process, we took a serious look at the way ADD training does business. We knew it was time for us to study the new culture that our leaders were trying to create and figure out what we needed to do to support them. We examined the structure, leadership, strategic orientation and measurement systems within the training department and began the work of aligning our training culture with the direction ADD leaders were taking the overall culture of the organization.

The Strategic Planning Process and Culture Change

Many companies think of the strategic planning process as somewhat mechanical. They get the right people in the room every year or two and devise a master plan – complete with mission, vision, operating processes, resources and budgeting. It's almost a matter of filling out a template. Then, once it is done, it's put on a shelf until the next year when the process is resurrected and repeated. ADD could not afford to waste time and energy developing our training plan that way. Instead, we chose to look at implementation in a new light and examine the cultural behaviors of the training organization. This meant looking beyond the surface layer of strategic planning (development) and examining the layers beneath.

Culture and Strategic Planning

A leader in the field of organization development and culture, Edgar Schein advocates that culture is "the accumulation of shared learning," and "a pattern of shared basic assumptions that the group learned to solve its problems." There are many definitions of organizational culture, but few have strayed far from Schein's. Schein challenges us to think of culture in three layers:

§   Artifacts
§   Values
§   Tacit or shared assumptions

Artifacts are what you see, hear, and feel in the organization. They are the visible processes and structures. Values are strategies, goals, and philosophies – why members of the organization do what they do. And shared assumptions are unconscious beliefs that are taken for granted. They are thoughts or conditions that are assumed to be 'true' and cause members to value them. Schein also believes that we must understand those shared assumptions in order to genuinely understand the culture.

Understanding Cultural Assumptions in the Strategic Planning Process

Importance of Shared Cultural Assumptions

Artifacts — What we do? • Behavior • Language • Structure

Values — Why are we doing it? • Philosophy • Strategy • Goals

Shared Assumptions — Is it what we want? • Unconscious taken for granted beliefs — perceptions, thoughts, feelings

Visible / Invisible
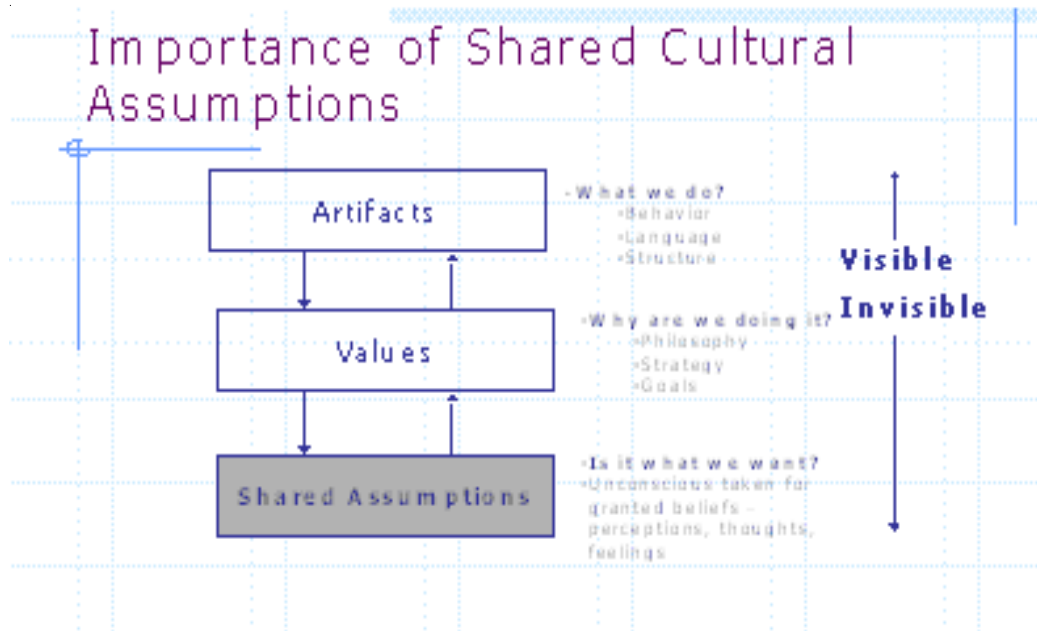
In our strategic planning process, we needed to look at ourselves in much the same way. That meant going beyond action plans and goals. We viewed as *artifacts* the action plans we implement, the plan itself, and the goals we are expected to achieve as part of our performance appraisal at the end of the year. However, we also had to plan for the deeper layers – *values* and *assumptions*. As with the deeper layers of culture, we needed to understand how we arrived at those goals, why we are implementing various tactics, and the overt behavior we must exhibit to other members of ADD. We had to understand basic assumptions – what we believe to be true about training overall, and specifically at Abbott. We sought to understand the unconscious beliefs we held about our industry, our business, and ourselves that we believe made us successful in the past.

Examining Strategic Planning Below the Surface

Actions/Behavior — What we do? • Strategy Implementation • Action Plans

Objectives — Why are we doing it? • Philosophy • Strategy • Goals

Assumptions — Is it what we want? • Unconscious taken for granted beliefs — perceptions, thoughts, feelings

Visible / Invisible
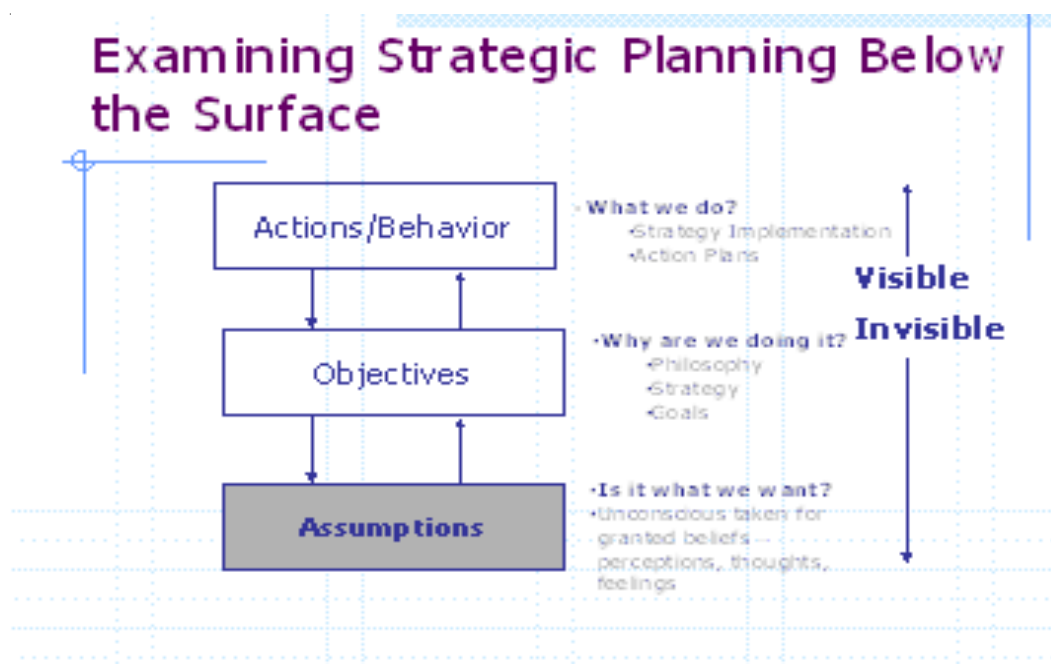
Understanding Cultural Assumptions in the Strategic Planning Process

<u>Understanding Our Assumptions</u>

To understand our shared assumptions and their role in our strategic plan, we looked to understand our relationship with our **external environment** and what has made us successful in the past; **how we integrate people** into the training organization; and our **indigenous assumptions** – the beliefs and truths derived from our national, ethnic, or religious upbringings.

It was nothing new to examine our relationship with our **external environment**. Traditionally, we assumed that what would make us successful in the future could be determined by what had made us successful in the past. However, with the new culture we were creating in ADD, we saw that what made us successful in the past may not necessarily make us successful in the future. This realization uncovered tacit assumptions we held that could have derailed our future performance. For instance, one tacit assumption was that the training system at each of ADD's domestic sites would be the same. After all, we'd spent the past two years standardizing aspects of our training system to create efficiency. The assumption was that ADD was moving to one system to execute training, and each site would be a derivative of that system. However, through an examination of our shared assumptions, we concluded that the training system does not have to look the same at every site – especially since each site supports different business objectives. Clearly, if we had acted on our initial shared assumption, it may have meant misalignment and the failure of our training efforts. To understand more deeply our assumptions about our external environment, both internal and external to ADD, we brought together the training leadership of ADD. We asked ourselves:

§ What has made us successful in the past in terms of: a) mission, vision, goals; b) structure, processes, systems; and c) metrics?
§ Will this continue to make us successful in the future?
§ What are our new assumptions about our external environment?

We tried to understand our assumptions about **internal integration** - how we acculturate members of the training department. We asked ourselves:
§ What jargon do we use in training to communicate our strategies and tactics?
§ Does everyone in the organization understand that jargon? What can we do to ensure that we all speak the same language?
§ Who are the key players in the organization? Are there insiders and outsiders?
§ How can we ensure that we are using everyone to the fullest potential?
§ How do we disagree with each other? How do we disagree with the boss?
§ How do we reward good performance? Is it visible, so as to impact behavior?

Last, but not least, we talked about our **indigenous assumptions** - those core beliefs we bring from our national heritage, ethnic background, or religious beliefs that affect the way we work. We tested our own assumptions about people and behavior.
§ How would members like to be rewarded?
§ What do they think about our leadership? Should it be more X or Y style?
§ Do we think leadership qualities can be developed?
§ Is teamwork or individualism valued most?
§ How are decisions made?
§ What messages are sent by how we manage our time? By our physical surroundings?

These questions were not meant to be all-inclusive, but helped us structure our thinking about the assumptions buried beneath the surface of our organization. Without unearthing these assumptions, even the best developed goals and action plans have the potential to cause confusion.

<u>Reflection on Strategic Planning at ADD</u>

In reflecting on this process, we are reminded of the famous baseball skit performed by Abbott and Costello called, "Who's on First." In the skit, Costello plays the new coach of a baseball team. He is interviewing Abbott to find out the names of the players:

Costello: "Who's on first?"
Abbott: "Yes."
Costello: "No, I mean the fellow's name. What is the name of the fellow on first?"
Abbott: "No, What is the name of the fellow on second, Who is on first!"

What makes this routine so funny is that Abbott and Costello are drawing on different assumptions. Abbott assumes Costello knows the players' names are Who and What, while Costello assumes Abbott knows he's asking him a question – not telling him the players' names. If you've seen this routine, you know that it is one of the funniest jokes ever written. Both men become frustrated, and they go on and on trying to figure out what the other is talking about.

Understanding Cultural Assumptions in the Strategic Planning Process

When assumptions are not clarified, people become confused and frustrated and communication can turn into conflict. But in strategic planning, unlike Abbott and Costello's skit, this scenario it is not a laughing matter.

##

Philip T. Anderson is Manager, U.S. Training Operation and Organization Development at Abbott Laboratories Diagnostics Division (ADD). He can be reached by e-mail at Philip.Anderson@abbott.com or by phone at (847) 935-6502.

Peter F. Sorensen Jr., PhD is Professor and Director of the PhD-OD program and the MS-MOB program at Benedictine University. He is Chair of the OD&C Division of the Academy of Management, and received the "Outstanding OD Consultant of the Year Award" from the OD Institute in 2003.

Therese F. Yaeger is Associate Director of the Organizational Development Doctoral program at Benedictine University, where she also teaches OD and OB courses. Her recent publications include *Global and International Organization Development* with Sorensen, Head, and Cooperrider, and *Appreciative Inquiry: An Emerging Direction for OD* with Cooperrider, Sorensen, and Whitney.

References:
Worley, C.G., Hitchin, D.E., and Ross, W.L., *Integrated Strategic Change*, Addison-Wesley Publishing, New York, N.Y., 1996

Challenging the Low-risk Method of Training

By Kevin Himmel and Peggy K. Steele

Does this situation sound familiar?

You leave your weekly operations meeting frustrated, feeling that once again, the training and human resources team is not considered a valued partner in the corporation. In fact, the Senior Vice President of Sales and Marketing actually said, "Our sales training is not effective. We're not getting immediate results with new hires or advanced sales training, and we can't afford to have our sales people offline for something that is just mediocre!"

This isn't the first time your sales team has identified lack of effective training as an issue. They can be a difficult and demanding group to please, but they are also the ones who produce results on a regular basis.

Your team has been tasked with putting into place a challenging but engaging system for training that measures results that executives and operations managers will respect. Where do you start?

The scenario is all too typical. Every day, training professionals face external challenges about the effectiveness of their training initiatives, and must try to balance providing measurable performance results with learning solutions that create lasting impacts. This is often especially true in the area of internal sales training.

To become valued partners within an organization, training teams must employ application-based interventions, which often require moving beyond low-risk methods of training.

MAKE IT REAL-WORLD

While appropriate for knowledge transfer and building basic skills, the traditional low-risk training methods – such as lectures, discussions, and other classroom related activities – don't engage participants on an emotional level.

On the other hand, moderate- to high-risk training, usually simulation based and set up to model reality, is typically considered for high-risk occupations like pilots, medical workers, emergency first responders, and the military. These simulations have increased risk and are practiced in an environment that is as close to the real world as possible. Pilot trainees can "crash" planes, surgeons make medical mistakes, first responders have seconds to make life saving decisions, and Special Forces troops can be "killed." The training is effective; these learners never forget the hands-on lessons they learn. But classroom/corporate training cannot replicate this type of simulated danger. Or can it?

Creating simulations that mimic a learner's real world job, even if that job is not life-or-death, provides opportunities for things to happen the way they would in the workplace In a simulated business world, for example, managers can make mistakes—sometimes serious ones that end up in litigation or as major career derailers; customer service representatives can create dissatisfied customers by failing to provide timely service; and salespeople lose sales, are demoted, and can even be fired.

In a custom sales simulation we recently designed, participants not only observed particular sales skills taught during the training, but

they practiced them immediately by calling on "customers" and presenting solutions to key decision makers. Teams competed against each other, and at the conclusion of the program, they either won or lost the customer's business. This process engaged participants mentally and emotionally, and the learning translated to on-the-job behavior change.

TELL A STORY

In Annette Simmons' *The Story Factor,* she states, "A good story simplifies our world into something that we feel like we can understand…. A story weaves detail, character, and events into a whole that is greater than the sum of its parts."

Simulations begin with stories based on real-world events. Like a good story, the simulation plot unfolds throughout the training, with new twists and turns added periodically to keep things interesting.

One way to design a "hook" for simulation-based training is to use elements of storytelling. Using three-dimensional, realistic-sounding situations lets participants begin with a context. Participants remain engaged and internalize the unique meaning they attach to the story.

Participants are moved beyond low-risk training when they engage with what is happening around them. During a simulation-based training, teams often interact to decide on and build solutions or to make recommendations. These interactions often create sub-plots to the story and help to reinforce the real-world challenges of teamwork.

CREATE RISKIER RESULTS

From an early age, we were taught to want to win, and we learned that competition creates heightened risks and results. Most children, wherever they grew up, lined up at some point, and someone shouted, "Ready? Set? GO!" As they sprinted to the finish line, many discovered that they ran faster when they had someone to beat. Children left the race knowing that they either had to practice more before the next race, or they earned "bragging rights" as the fastest kid on the block.

Competition and risk built into training helps prepare participants for the environment they are likely to see in their day-to-day jobs. The goal of simulating with elevated risk is for participants to transfer their experiences, learning, and behaviors back to their jobs.

Simulations can build a moderate or high emotional risk without high-risk consequences by using strategies such as:

- Creating a real-world scenario
- Intensifying peer-to-peer interaction
- Encouraging team decision making
- Utilizing day-to-day and cumulative competition
- Sharing performance results
- Holding individuals and teams accountable
- Awarding business to only the top performers

Effective real-world business simulations challenge the traditional corporate instructional design mantra of providing a totally low-risk environment.

Challenging the Low-risk Method of Training, (con't)

On one hand, the simulations are low-risk because participants don't *actually* lose the sale or the job. However, the feelings evoked from an experience with heightened emotional risk stick with participants long after the training ends.

DON'T OVER ENGINEER IT!
Whether face-to-face, on-line, or in a blended combination, the key to simulations is the human element. Powerful simulations are not over-engineered. They allow flexibility by leaving competition, human dynamics, and real-world scenarios intact to drive final outcomes.

I (Kevin) recently led an instructional design team that created a custom sales simulation for the training and development industry. After it was created, I was asked to participate in the pilot as a member of one of two sales teams. I thought about how lucky my team was to have the designer on board, and how our team would be at such an advantage because of it. My ego and confidence were quickly deflated after the first round of customer interviews, when I discovered that, although I could recite the process of the simulation and the design elements, I could not influence or predict the human dynamic. Our team's interactions with the customers and individual performances provided engagement and risk that was unpredictable to even the designer of the simulation. The human dynamic keeps simulations real and differentiates them from games.

While you don't want to over-engineer a simulation, it's critical to arrange for ample time for reflection and to provide facilitation in the learning process. Tight, efficient simulation design provides for guided lessons and applications to the real world. This is the most important part of the learning experience. Without it, simulations are at best interesting, and at worst, out of touch with the business needs. Learning——and resulting performance changes—come from guided reflection and accountability engineered into the reinforcement, so that in the next stage of training, skills just learned must be used correctly, whether on-the-job or in a more advanced practice simulation.

WHEN TO USE SIMULATIONS

Simulations are not appropriate for all types of learning. It would be overkill to design a simulation that teaches new employees the skill of punching in and out on a time clock...

Face to face simulations are appropriate when the risk is worth the reward. The risks are the gamble involved. For example, a simulation may include a variety of real world risk affecting things like quality, cost, time, people out of the field, etc. Rewards are the immediate, visible application of skills and the recognition that going forward with this type of action or behavior is desired. For example, in sales it may be the importance of identifying the decision making process in advance of proposing, or it may be adding a step to the initial discovery with the client to check their assumptions. While these can be taught in traditional training, doing or not doing these tasks in the simulation will often make the difference between losing the business or gaining it. Consider using simulations for training when the consequences of not following certain processes, procedures or practices are severe, or where skills must be learned and applied immediately on the job.

On-line simulations are effective when technology can enhance the learning and decision making process, while recreating the level of emotional involvement necessary to get the feel of real-world consequences. The emotional involvement may include things like wanting to win and wanting to find out as much as possible about the competition. Participants' engagement levels are another key to determining emotional involvement. How engaging is the simulation? Are participants engaged enough to go beyond the minimum requirements? We have seen participants work as teams and stay up all night before a final presentation to help create an edge and put their best foot forward…much like the real world.

Simulations provide the benefits of sound instructional design in creative ways that let participants take control of their own learning. Learners begin to remove negative connotations about a "training event" and become engaged at a higher level when they realize what's in it for them.

Consider this new ending to the situation from the beginning of the article:
COO: "Our next agenda item is the progress on three key sales metrics. What trends are we seeing in customer spending, new product buy, and proposal close rates?"
Senior VP, Sales and Marketing: "All three have gone up in the past two months, and month three results look like we have increased results again in all three areas. I think we're on to something. We started the new sales training program, but we also rolled out a new marketing campaign three weeks ago."
You: "The sales training has been getting great feedback from both sales managers and national account executives. They say it is really hitting the mark."
COO: "But can it demonstrate an impact on these three key sales metrics from the training?"
You: "Yes, it can. The training is conducted in teams of account executives, and they are all passing the knowledge and skills tests at the end of the program. We're also tracking the post-training rate of business closed compared to groups that haven't taken the sales training. The groups who have gone through the training are clearly getting results, but the groups that are waiting for the training are flat."
Senior VP, Sales and Marketing: "It looks like we have only trained twenty percent of the field. How soon can we get everyone through the training?"
COO: "This data shows the impact on sales, so let's get everyone up to speed as soon as possible. Be sure we track the results and do what is necessary for the sales managers to support the effort. We can't afford to waste more time."

Copyright © 2004 Regis Learning Solutions.

Kevin Himmel (khimmel@regislearing.com) is the Director of Performance Consulting for Regis Learning Solutions.

Peggy K. Steele (psteele@regislearning.com) is President and CEO of Regis Learning Solutions.

Regis Learning Solutions specializes in the creation of learning solutions in leadership, management, communications, ethics, and measurement which help organizations build and sustain meaning and accountability in the workplace. For more information visit www.regislearning.com

Best Practices

Designing Your Own Development Plan

By FLORENCE STONE

As a trainer, you may design training sessions and learning programs regularly. But who designs *your* ongoing development? Beyond pursuing degrees or taking additional courses, finding a mentor is an excellent way to advance your career.

A key step in a mentoring relationship is the co-creation of your development plan. First, you and your mentor identify your realistic career aspirations and determine the job requirements. Then, you can create a needs assessment, identify training opportunities to fill skill gaps, and determine experiences that will enable you to practice your new competencies as well as show off to higher-ups. Here are a few tips for designing your plan:

§ Prepare a mission plan with well-focused learning goals. Remember to develop SMART objectives (specific, measurable, achievable, realistic, timely).

§ Develop a module for each new subject to be mastered. Specify the method of study (e.g., offsite training, on-the-job experience, self-study), the means by which you will measure the knowledge learned, and the timetable for mastering the development objective. For instance, a development objective might be to improve your project management skills; the measure might be demonstration of better leadership skills; the means of achieving the objective might be participation on a project team. The dates for completion will correspond with the activities.

§ Put your plan on paper or on your computer. If you write it down, use a pencil! Visualizing the future is hard enough, given today's fast-accelerating changes, and your development plan may need to be adapted periodically.

Finally, as you list your objectives, think beyond job skills to life skills. Given your long-term goals, would stronger time management skills be wise? If you want to supervise other trainers, you may need to fine-tune your interpersonal skills. If you could use a little extra self-confidence, you might include periodic self-talks in which you remind yourself about just how great you are!

Florence Stone is the author of *The Mentoring Advantage* and editorial director of the American Management Association. She can be reached through her publicist, Al Martin of Dearborn Trade Publishing at amartin@Dearborn.com or (800) 621-9621 ext. 4652.

Making E-learning Interactive and Engaging

By Mark Steiner

Learning is not attained by chance. It must be sought for with some ardor and attended to with some diligence.

–Abigail Adams

I've always liked this quote from two perspectives. From the learner's perspective, it takes work to learn, and the learner must offer some effort. But the quote is equally relevant from the instructional designer's perspective: it takes hard work to create effective e-learning. Although technology has greatly advanced in the field of e-learning, designing custom, interactive, effective e-learning is still not easy. It probably never will be, either—at least for the foreseeable future. It requires forethought, not to mention a working knowledge of concepts and methodologies such as gaming strategies, expectation failure, and rapid prototyping.

One way to approach this topic is to ask why are there so many non-interactive and unengaging programs out there. These programs are referred to as "page turners," as they are often an electronic version of a book, with text and graphics on each "page" but little interactivity to engage the learner. It seems many people don't know the difference between training and information. Yes, there are many times when reference information is all that is required to support the learner, but when it comes to teaching tasks, order of events, and processes, mere words and graphics aren't enough.

Where were you when the page was blank?
–Truman Capote, in response to John Huston's criticism of his script

OK, so I've sort of ripped on traditional page turners. What is it that can be done to transform page turners into e-learning that effectively imparts new knowledge and changes learners' behaviors?

A basic strategy is to design programs that invite—even require—the learner's attention, focus, and interaction using a liberal dose of intrinsic interactivity. Intrinsic interactivity means designing scenarios in which the learner interactivity and content (hence, context) are intertwined. Remember, clicking the "Next" button to continue is <u>not</u> intrinsic interactivity. All you really know is that the learner found the Next button!

Gaming Strategies

Games aren't just for kids. Most everyone enjoys a friendly competition and diversion once in a while. If X-Box makers ever refocused their successful approach from themes like grand theft auto and shooting every alien in sight to exciting topics like critical thinking and interpersonal skills—OK, that may be a stretch, but perhaps it illustrates the point. So what are some of the gaming elements that can be purloined to more effectively engage learners in e-learning?

One gaming element that contains intrinsic interactivity is simulations. Now before you say, "I can't afford to do simulations," let me say that simulations do <u>not</u> have to be bank-busting NASA-level machinations. A simulation, in its simplest terms, is a representation of an item of equipment, device, system, or subsystem in some realistic form. Topics of simulations can include software (Microsoft Word), industrial processes (operation of the #1 Coiler), business processes (submitting and tracking client proposals), and interpersonal skills (conflict resolution). While high-end graphics are certainly nice, much more important is engaging learner interactivity with simulation inputs, outputs, and their relationships.

Another gaming strategy is to mimic reality. In reality, how have we learned most of what we know? By making mistakes! Mimicking reality means allowing the learner to make mistakes. Part of this strategy is to provide risk/reward scenarios. Put the learner into some risky scenario where a decision needs to be made, and include consequences for each right and wrong response. Consequences need not be electro-shock therapy, and can even be used to "keep score." And if you are going to keep score, you're incorporating another gaming element: competition. "Did you see Bill in Accounting got top score on the Security Awareness scenario? We'll have to top him!" Inject appropriate humor into your competitive game, tell stories, evolve characters, and you'll create a fun effective environment for the learner.

Expectation Failure
It's not the things we don't know that get us into trouble; it's the things we do know that ain't so.
–Will Rogers

Not only do we learn much of what we know by making mistakes, but we sometimes learn best by making quite memorable ones. When people expect something to occur or behave in a certain way, they're assuming that new experiences are like old experiences (or in other words, that their expectations will turn out to be true). But what happens when expectations turn out to be false? Expectation failure is a design strategy that involves letting learners attempt a task the way they think they should, but intervening at the expectation failure and explaining the repercussions of their actions. This can be effective in teaching tasks and behaviors an employee must perform on the job.

Rapid Prototyping

Virtually every important action in life involves educated guesswork. Too few chances reliably translates into too few victories.
– Thomas W. Hazlett

When designing your e-learning, consider alternative work methods. Traditional linear development methodologies (sometimes called waterfall) have proven unsuccessful in the design and development of software and e-learning. An iterative approach called rapid prototyping is a better alternative. Fairly early in the design stage, build a small-scale prototype that exhibits the key features and interactivity you desire. Explore this prototype and test it with actual learners to reveal any problems or failure points in your initial design. The advantage of rapid prototyping is that it allows for tryouts of key concepts at early stages, when costs are small and changes can more easily be made. Rapid prototyping may be relevant to all kinds of training development projects, but its value is most apparent in the design of e-learning. While it is more effective to use an interactive tool to build prototypes, whiteboard and paper mockups can also be useful.

To illuminate the value of rapid prototyping, I like to use the One Eight or Eight Ones story. Say you have a graphic artist who has been given eight hours to design an interface. One approach would be to communicate your requirements and send the artist off to spend eight hours. The other approach is to assign the artist eight one-hour segments. Ask the artist to do what she can in one hour, and then review and discuss her progress. Repeat eight times. While the second approach requires much more communication, which scenario do you think generates the better result? Of course, the second method facilitates more idea exchange and feedback loops, and allows identification of potential problems or missteps early on. Other residual effects and strengths of rapid prototyping include facilitating early client and team involvement, a deliberate and early focus on the learner, a better product in the end, and if it's done right, a more cost-effective product.

Case Study

Let's examine an actual project for a large telecommunications company and describe examples of each concept. The courseware and simulations were part of a comprehensive effort that included instructor-led training and hands-on labs to train equipment installers.

Simulations

Learners walked through an equipment installation online using an interactive simulation program that mimicked real life. Learners could do *what* they wanted *when* they wanted, but could also ask for help when they needed it. Learners are always much more open to help when they ask for it, rather than having it forced upon them, though the help was always formed in a question so that the learner could provide the answer. An analysis determined that employees needed to "talk" to people, "look" at/for items, "do" particular tasks, "navigate" around the customer's premises and rooms, and use "tools" at the correct times in the process. This interface was consistent throughout the various tasks, of which there were many.

Gaming and Keeping Score

The installation of the equipment needed to be completed in two hours or less. Time was of the essence for the business model (isn't it always?). A clock was put on-screen, and behind the scenes, tasks were assigned amounts of minutes. Learners could go where they wanted (discovery learning), but each task, right or wrong, incremented the clock to help them understand the relationship between tasks, process, time, errors, and consequences. For example, the learner could "talk" to his boss, but if it was the wrong thing to do at the time, the boss didn't provide him with any insight, although the clock ticked forward 3 minutes.

Expectation Failure

Many tasks in this installation could be approached in multiple ways, although one way was usually preferred. The learner was allowed to proceed down a non-preferred path, but if he did, the program explained to him why the preferred path was better, and the consequences and inefficiencies of the path he selected. In one instance, the installation location for a box with a hinged door needed to be selected. However, there needed to be enough hinge clearance to be able to open the box. The learner was allowed to initially select a location that didn't provide hinge clearance, but then a screen gently reminded the learner that without hinge clearance, the box would not be able to open.

Summary

Unfortunately, poorly designed e-learning abounds in the marketplace, and it probably will for some time to come. Not all e-learning can or should be highly interactive. From the outset, complete an objective assessment to identify the most critical and well-suited content areas. Finally, it takes time and experience to learn how to design interactive e-learning. Select small, early wins to bolster your confidence and gain management support. You might begin by upgrading just one section of an existing course or module to include more interactivity. By doing this, you'll be standing up for the learner and for our profession, delivering higher quality learning interventions we can all be proud of.

Mark Steiner is President of mark steiner, inc., an e-learning consulting company. His company's web site is www.marksteinerinc.com and he can be reached by e-mail at mark@marksteinerinc.com or by phone at 773-392-7967

Incorporating States in Training Design

By JIM ACCETTA

You're in front of your audience, looking out and realizing you're just not connecting with them. The blank, expecting stares, waiting for you to dazzle them, teach them, move them. Then, you feel the butterflies…you may tell yourself, "It's not working." What's next?

Learning to establish and incorporate desirable emotional states in yourself and your audience allows you to become more effective and valuable to those you train, as well as those who hire you. More than a mere provider of information or skills, you become increasingly entertaining, captivating, even charismatic as you incorporate states in your instructional design.

How do you want to feel when you are training groups? How do you want your audience to feel? Certainly, you want your participants to be alert, interested, excited about the content. What about feeling frustrated? Curious? Repulsed?

> ➢ **Any strong emotional state you elicit in your audience will ensure that the content piece associated with that emotional state will stick.**

Salespeople often say, "We don't sell products or service, we sell emotions." Great salespeople understand the importance of "emotional buy-in" during the sales process. Are we not attempting to sell ourselves—our information, skills and resources—to our audiences, too?

Internal trainers want buy-in for the skills and ideas involved in their training and to make them stick. They witness their effectiveness by seeing and hearing people use their new skills on a day-to-day basis. External trainers need sales abilities too, to sell not only their training products and services but also themselves as providers. Audiences walk away from the best training presentations with skills and abilities learned…and the desire for future engagements with the same trainer!

This article describes valuable instructional design elements for guiding your audience into the emotional states that will keep them curious, interested, excited, and confident during and after the session.

Modeling

The most effective way to create a state in your audience is to go into the desired state yourself. When you are in rapport with others, they will follow you by matching your state. This is *pacing and leading,* and occurs in one-on-one relationships as well as with you and your audience. As a skilled presenter and professional communicator, you can pace and lead your audience to the desired state to aid learners in gaining the most from your training.

Recalling Past States

Do you recall a time when you felt extremely curious… perhaps as a child, at your birthday party when people brought gifts, or at Christmas or Hanukah when you saw gifts wrapped and waiting for you to open… wondering what was in the neatly wrapped package? Perhaps you even took a peak by trying to peal back the tape and wrapper, just to see….

It is fairly simple to elicit states in others by simply asking them to remember a time or imagine a time when they felt excited, interested, or scared, and then help them to recreate that experience in their mind through the use of general sensory-based descriptions (visual, auditory, kinesthetic) of that experience. This is helpful for breaking unresourceful states as well.

Anchors

Anchoring involves associating an internal response with some external trigger (stimulus). The classic example, which may ring a bell, is that of Pavlov's experiments with dogs. Anchoring occurs every day in one-on-one interpersonal situations, families, groups, and through mass media.

Building anchors into a presentation is one way to design instruction to help learning stick. One of the ways I do this is to associate various learnings with future events, including what people will see, hear and feel in these situations. This is referred to as *future pacing*. I ask people to imagine for themselves, a day or two from that time, or a week or two in the future, what it will be like to have mastered and be able to use whatever skill/ability I'm about to teach. Then I have them play this scene in their minds, and while this is going on, I ask the audience to think about (and in essence rehearse) how they will use this skill/ability. At that point, not only are they getting some idea of what I want them to learn, but also mentally rehearsing the skill/s in specific situations where it will be useful! The idea is that, when the situational cues are present, the learning comes to mind and is used in that context.

States and Anchors

Just as Pavlov's dog needed to be hungry at first in order for the experiments to be useful, your learners need to be in a certain state in order for the anchors to be set, for the information to be desired. As trainers, we must time our material in relation to the state of the audience. We are not just providing information—we are also providing stimuli that get connected to the reference experiences of the audience.

A useful sequence of states for learning includes: Hesitation, Frustration, Impatience, Wonton Desire, Go For It![1]

What's the value? Imagine beginning your presentation by eliciting a state of curiosity. You can do this by discussing a situation in your own life, or by using a story or metaphor, or by inducing confusion by presenting multiple and seemingly unrelated ideas in succession. As you continue, move into a state of hesitation/frustration… then to a state of "aha" at the very moment you present the information you want them to learn.

For simplicity, let me use the example of teaching how to tie shoes:

1. I start my presentation by building some rapport with the group, being inviting, making eye contact, sharing the outline of the presentation about tying shoes.

2. Then I begin to discuss the many ways that people do things in the world, and how wondrous this is (in a curious state, of course, using body language and tonality that denotes curiosity).

3. Then I go off on some tangent, some story of learning or exploring…capturing whatever other state or experience I want to bring the audience/participants through. (Remember, whatever we say and do points the minds of our participants in that direction!) I mention that I will get to the shoe lace lesson, and talk on and on a bit more (perhaps even a story about me hesitating, or feeling frustrated), and talk about many frustrations I have seen time and time again in attempting to tie shoes.

4. Then I introduce two freshly tied shoes, with wonder and amazement at how great it is to produce such a product. I demonstrate the ease of tying shoes as well, modeling confident mastery of the skill.

5. I then go through the lessons, and during the center of the presentation of each step, I elicit curiosity and the joy of discovery along the way, as well as moving any frustration that may be present already to curiosity. I do this with vocal inflection and my own emotional states.

Each step along the way, standing on different parts of the stage, I anchor these states using different body positions and different tones of voice that accompany my own states.

Storytelling

Another way to create states in your audience is to tell a story that is compelling enough to gain audience attention and to carry them from state to state as you tell the story. Using a metaphor in your story is helpful. Mark out each state with body posture, position on stage, tone and tempo, and of course your state.

A story I like to use to start some training is the story of teaching my children how to ride a bicycle:

*I have two children, Gina and Chris; Gina is the older. Now you probably know already that people learn at their own rate and speed…you may learn at one rate while the person next to you learns at another. We all have our own particular ways of approaching new experiences, just as we have our own ways of approaching different experiences. (*Frustrated yet with my hesitation?*)*

Well, my daughter was the first to learn how to ride her bicycle. She was about 3 or 4 and we got the training wheels on…it was a beautiful pink Barbie bicycle, and she loved Barbie. Anything that had to do with Barbie held its own special place for her. You should have seen her looking at the "Barbie Bicycle" with wonder and awe. After explaining the whole bicycle riding thing and some time with training wheels, she really wanted to know what it like was to ride without training wheels. What was it like to ride like her older friends ride? (Curious?) Well, we took off those training wheels and she sat on that bicycle, readied herself with Dad (me) right behind her holding onto the seat. She was ready… and waiting… (Are you waiting with anticipation)…and then we were off…. AND I PUSHED AND SHE ROAD AND NEVER LOOKED BACK!!!! (MOTIVATION, SUCCESS, YES!!!)…

---

[1] This sequence is one most recently being taught in Neurolinguistic Programming trainers training related to creating states of learning in an audience. I have added curiosity in with frustration and impatience as it is part of how we learn and a state I love and live in so often myself! (NLP Trainers Training, Orlando Florida 2003-2004)

Now my son, on the other hand, was a different story…

At this point, I may stop the story and move onto to something else, or continue on with the second part of the story… *depending on the audience response thus far. Flexibility is a key component in NLP as well as in most success as a professional communicator!* You see, I can still return to the story near the end of my presentation, a technique aptly called *looping,* or bringing in information from the beginning to tie the presentation together in the minds of the audience.

Nested Loops

Nested loops refer to designing a program by nesting or packaging information inside states at various times during the presentation. For example, after building initial rapport with the audience, telling stories that elicit enthusiasm, hesitation/doubt, and curiosity, then reviewing or discussing content of learning (which often includes a demonstration and then an exercise), the idea is to backtrack through curiosity, hesitation and enthusiasm to "nest" the learning. The effect of nesting loops is to have access to states that you want to elicit in your audience, as well as to package learning so that it occurs at unconscious levels, much like an embedded command. A question for the presenter during preparation will be: "What are the states I want to elicit in my audience, and how can I present this so that it facilitates and installs the needed resources?"

Nested loops are used in hypnosis and training through the use of story telling. By telling a part of a story, the trainer begins a "loop," then gives some information, tells another part of a story, gives more information, etc. Information becomes packaged in and between the stories. Once optimal learning states are achieved, experiential exercises are often inserted between stories. Then the "loops" are closed by eliciting the states in the reverse order that they were opened, either by recreating the states through other stories, reversing the anchors through tone or gesture, or by completing the stories.

Incorporating States

The next time you start to design a training program, remember to ask yourself how you want your participants to feel as they learn. Incorporating states into your instructional design could turn a disconnected group into a roomful of alert, interested, excited learners who want you back again and again.

Jim Accetta is the founder of Midwest NLP, Inc. (www.midwestnlp.com). He can be reached by e-mail at jim@midwestnlp.com or by phone at 847-749-0759.

Resources:

Bandler, Richard and LaValle, John. (2003) Charisma Enhancement-Trainers Training:
        The Society of NeuroLinguistic Programming (NLP) Orlando Florida, 2003-2004

Hall, L. Michael Ph.D. (1996, 1999). Becoming More Ferocious as a Presenter, Neuro-
        Semantics Publications, Washington, D.C.

James, Tad, MS, Ph.D. & Shephard, David BSc, DES. (2001) Presenting Magically:
        Transforming Your Stage Presence with NLP. Crown House Publishing, Ltd.
        Williston, VT.

Lankton Stephen R. and Lankton, Carol H. (1983). The Answer Within: A Clinical
        Framework of Ericksonian Hypnotherapy. Brunner/Mazel, Publishers New York