Prepare to Succeed and Be Credible
A Valuable Lesson for Trainers and Facilitators
Elaine Biech

I credit Bob Pike for one of the first and most critical lessons I learned as a new trainer. His six Ps for an effective training of, "Proper preparation and practice prevent poor performance" have laid a path to successful training for me. There are many reasons why training may not be successful; your lack of preparation should never be one of them.

You are 100 percent in control of what you put into your preparation and practice prior to each training session that you design and deliver. That means of course that you must be committed to make the time for preparation. Sometimes it means that you may need to cut into your personal time to be truly "prepared." It may mean that you need to practice with your family and friends. It may mean that you need to stay up late to set up your room for success. It may mean that you need to arise at O'Dark-thirty to arrive at the training site to check out audio visual equipment. It may mean lots of things, and the most important thing that preparation means is that you will be able to "prevent poor performance" and deliver successful training.

This step encompasses preparation from three perspectives: preparing the training setting, preparing the participants, and preparing yourself for a successful training session. The step also identifies numerous ways to practice the content—some you will undoubtedly have used in the past, others might be new and fun to consider using in the future.

This Step is Important for Success

Participants are involved in your final product—the training session itself. But few even guess how much effort it takes to make the job "look easy." Only those who have been trainers will have a clue as to how much time you have put into your preparation.

Time—it does take time. When I first became a trainer I was told to plan on 10 times as much preparation as delivery. That means if you plan to deliver a two-day training session of seven hours each, you need to allow for 140 hours of preparation and practice. That is often impossible in today's fast-paced, changing world. I am not certain if anyone measures this any longer, but I would guess that we are down to a five to one ratio and that is about how much time I invest in each session—and sometimes the set up day is a very long one.

I've been in the business for over thirty years and during that time I have never figured out how to get around the upfront investment of time. I invest about the same amount of time for each session whether it is my first delivery or my tenth delivery. I know that to be my best, I need to prepare and practice.

Why? Why have I called out preparation and practice as a step to successful training? The primary reason is that it is one of the most important ways to ensure that your participants
get what they came for—an excellent learning experience. After all, that’s what training is all about—the participants.

You can have the best training design, the coolest PowerPoint presentation, the best business objectives, and a great transition plan. But if you lose your participants because you don’t have the materials you need, AV delivers the wrong equipment, or you don’t remember what needs to be presented in a certain section, your participants may lose confidence in you and may not learn what they came to learn.

Preparation and practice are completely under your control, allowing you to be your best as a key step to successful training.

Preparing the Training Setting

Have you ever walked in to a training room as a participant fifteen minutes before the session started and found the AV people poking out from under a freshly skirted table frantically trying to hook an obstinate computer to an equally stubborn projector? Bumped into the catering wheeling in the refreshment table? Found facilities people scurrying about adding extra chairs? Noticed boxes stacked in the front of the room and participant materials askew on the tables? And noted a distraught trainer trying to arrange her table in the middle of it all? This is not the way any of us would want to start a first day of training. It happens all too often.

Establishing an environment that is conducive to learning is a small, but important step to successful training. How can you avoid the scenario described above? I only know one solution. Preparation. This means that you:

- Must begin planning at least a week in advance
- May need to get up very early to arrive at the site
- May need to stay late at night to get into the room after the dinner group the evening before
- Will probably need to make special arrangements with the hotel or building night or morning staff
- Will need to coordinate with a number of people: hotel sales and catering or your company’s food service; AV, facilities, building janitor or hotel’s housekeeping
- May need to be prepared to rearrange your room upon seeing it (I often do)

Planning and coordination ensures that your participants will arrive to a welcome and relaxed atmosphere. A room that is ready and waiting for them is the first statement of the training: someone took the time to prepare. Figure 4.1 presents a list of questions you might ask about the location.

Key Point

Add the cell phone numbers of the people responsible for equipping and setting up your room to your cell phone’s memory. You will be happy you did when something goes wrong.
### Figure 4.1 Questions to Ask About the Location

Good preparation means that you have all the answers about the location that you need. Use it prior to your next training session to prevent as many mix-ups as possible.

#### When?
- Date of the training?
- Start and end time?
- Does the allotted time match what's needed for the content?
- Time of breaks, lunch?

#### Where?
- Where is the session?
  - On site or off?
  - What's the address?
  - Room number?
  - What's the size of the room?
  - Do you need breakout rooms?
  - Is the room readily accessible for all?
  - Is food available nearby for breaks or lunch?
  - Do you need directions? Is it easy to find?
  - What's traffic like?
  - Will participants need to travel to get to the site?
  - Telephone number of the site? ____________ What time are the phones covered?
  - Is public transportation available?
  - How do you get materials to the site?
  - Is the room free of obstructions and distractions?
  - Enough wall space if you intend to post flipchart pages?
  - How is heating and cooling adjusted—by you or staff? And if staff, who is the contact person?

#### What?
- What kind of training is expected?
- What resources are required?
- What materials do you need and how do you get them?
- What AV equipment is required and who supplies it?
- Will you have a room and group size that will require a microphone? If yes, who is the contact person ____________

#### Who?
- Who is the key planner?
- Who are the participants? How many?
- Can you get a participant list?
- What information can you learn about the participants? Background? Positions?
- Why were you chosen to deliver training?
- Who is the contact person at the training site? What are this person's work hours? Contact number on site and cell? ____________
- What is the contact number for the AV set up?
What should they see for the best learning environment?

- **Order:** Boxes are hidden, chairs are aligned to the tables, participant manuals, name cards, and other materials are lying on the table identically at each place setting.
- **Seating:** Chairs and tables should be arranged to best meet the session objectives (see Figure 4.2) and should be the most comfortable available. All participants should be able to see the audio visuals from their seats.
- **Refreshments:** If they are provided should be set at one end of the room on clean table linens and include everything a participant might need.
- **Trainer’s Table:** A table at the front of the room with materials ready to use in the order that they will be required during the session.
- **Audio Visuals:** All equipment set up and ready to go. It’s nice to have something on the screen, at least the title of the program so participants know they are in the correct room or a series of rotating quotes so that participants can read them while they sip their coffee.
- **Lighting:** Lighting should be bright and cheery. Natural lighting is best, but if you are in a ballroom without windows, be sure that facilities has turned the lights to the brightest setting. You should know how to adjust the thermostat if necessary.
- **You:** ready and waiting to greet participants as they arrive. If you’ve examined the participant list you might have picked up a few opening discussion items, e.g., where they are from, their department, a unique name. You should be prepared at least 30 minutes prior to the session so that you can greet your participants and make them feel welcome.

What about table arrangements? Your room setting should further enhance your learning environment and will have an impact on your training results. You should select the arrangement that meets the needs of your training objectives. Is the objective to have participants work in one same small sub-group most of the time to “build” that team? Is the objective to move participants into lots of different sub-teams so that they might at one time or another work with everyone else in the room? Is the key objective to strengthen the one large team? Will there be lots of small group work? Large group discussions? Active movement? Mixture of all?

Figure 4.2 displays six common seating arrangements and informs you of the advantages and disadvantages of each.

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**Key Point**

Turn the list of what participants should see into your personal checklist of room preparation.

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**Key Point**

If the room has a telephone, be sure to turn the ringer off. Provide an alternate number for participants who may be expecting an important message.

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Listed below are six of the most common seating styles for classroom training. They are listed in order of my favorite choices from first to last. Often you will not have a choice and you will need to make do with what you have.

<table>
<thead>
<tr>
<th>Arrangement</th>
<th>Group Size</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>U-Shaped</td>
<td>12 - 22</td>
<td>Encourages large group discussion; Builds the larger team; Close contact with participants</td>
<td>If a small room, may be difficult to work with those on the other side; Linear lay out makes eye contact between participants difficult</td>
</tr>
<tr>
<td>V-Shaped (V points to front)</td>
<td>Teams of 4 - 5 and Groups of 16 - 25</td>
<td>Easy to work in table teams; No one has back totally to back of room; Best alternative using rectangular tables</td>
<td>Some difficulty to promote teamwork among the entire group</td>
</tr>
<tr>
<td>Clusters</td>
<td>16 - 50</td>
<td>Promotes teamwork in each cluster; Everyone faces the front if chairs on one side only</td>
<td>Difficult to get participation from those who face the back; Some participants may need to move chairs to face the front</td>
</tr>
<tr>
<td>Single Round/Square</td>
<td>8 - 12</td>
<td>Facilitates problem solving; Smaller size promotes total involvement; Easy for trainer to step out of the action</td>
<td>Media and visual use is difficult; Limited group size</td>
</tr>
<tr>
<td>Conference</td>
<td>8 - 12</td>
<td>Moderate communication among group</td>
<td>Maintains trainer as lead; Sense of formality; Inability for trainer to get close to participants</td>
</tr>
<tr>
<td>Classroom</td>
<td>Any size</td>
<td>Traditional, may be expected by learners; Trainer controls; participants can view visuals</td>
<td>Low involvement; One-way communication; Difficult to form small groups</td>
</tr>
</tbody>
</table>

What if you are conducting a webinar or some other eLearning event? Just because you will not be in the same room as your participants, is no reason to think you don’t need to prepare. Although each type of technology is different, here are a few ideas for preparation for a webinar.

- Select a day and time no less than six weeks prior to the webinar: Research show that the best days of the week are Tuesday, Wednesday or Thursday. The best time for a United States national audience is between 12:00 and 2:00 EST.
- Send invitations: It appears that email is the best way to invite and inform people of a webinar. Notices in newsletters, links to websites, or press releases are much less effective.
✓ Respond immediately: When participants begin to register for the event, send a response and the guidelines immediately upon receipt from them. You want to maintain the momentum.

✓ If you anticipate first-time uses, you may decide to provide an orientation to online learning such as: having them complete a system check the day before; providing written instructions for chat, posting, asking questions; demonstrating each tool with an early activity; or even asking a polling question early to get them started.

✓ Design your webinar: Plan for a 30 to 60 minute session. Create objectives, and plan your delivery matrix. The number of objectives for this length of session should be three major objectives or up to six closely related objectives. Allow time at the end for questions from the participants.

✓ Develop a compelling PowerPoint presentation: Make the slides interesting to look at. Use one color scheme and add variety with graphs, clip art, or photos. Dark text on a light background is easier to read, avoiding red text except for rare emphasis. Avoid too much text on each slide. Use the 7 x 7 rule (maximum of 7 words in 7 lines) just as you would for any other PowerPoint presentation.

✓ Keep your PowerPoint file size small: This benefits those who may dial up, e.g., avoid color gradients. Ensure that your slides are 10" by 7.5", sized for an on-screen show.

✓ Design to keep participants engaged: Use the interactive Web conferencing features available such as polling, chatting, quizzes, or surveys, to keep participants involved. Use the whiteboard feature for brainstorming or creating drawings.

✓ Plan for Q&A: Prepare for the kinds of questions you anticipate.

✓ Practice: Rehearse your presentation several times. Schedule a full dry run with your conference provider to be sure you are comfortable with the platform. Discuss how you will handle problems that may occur.

✓ Rehearse the production portion: Include the logistics during your rehearsal, e.g., introductions, transitions, hand offs, and the logistics of who will be where.

✓ If using a phone during the session plan to talk into the telephone handset for the best audio quality. A speakerphone or cell phone does not always provide the best quality.

✓ Maintain a studio-like atmosphere: Post a "Do Not Disturb" sign, eliminate background noise, turn cell phones off, mute your computer, close email.

✓ Follow up immediately: Acknowledge all registrants by email. For those who attended send a thank you and instructions for how to access the archive for the event. Send a “sorry we missed you” to any who registered, but did not attend. You may also wish to ask for feedback.

Key Point
You may wish to plant a question in the group to increase other participants’ comfort to speak up.
These ideas certainly do not cover everything you need to do, but they will get you started along the right path. If you are new to facilitating online you will experience new challenges. For example, two things I find most difficult is managing airtime and not coming across as the expert. I like to facilitate discussion among learners and pull ideas out of them as opposed to “telling.” To ensure that this happens requires more thought before the session. Activities need to be well thought out and interaction designed into the session, as opposed to relying on spontaneity. You might ask someone whom you know will be on the webinar to plan to contribute to a certain content area.

Technical difficulties create another challenge and that’s why you will most likely have technical support. The most frequent occurrence is participants who have forgotten to get their password or have forgotten how to sign in. You can reduce this challenge by asking everyone to sign in at least ten minutes before the session begins.

A more personal challenge is getting to know the participant as a person. It is difficult for example to determine the participants’ learning style or to assist with specific issues and concerns. When listening it is hard to hear the content and even harder to hear the intent of the message.

Even with the obvious challenges, webinars fill a training need. Your preparation and practice is even more critical using this training venue.

Preparing the Participants

Who hasn’t assigned a group of participants a chapter or article to read, only to learn when you get to that point that 10% have read it thoroughly, 15% have skimmed it, 25% didn’t have time, 25% forgot about it, and 25% claimed that they never received the assignment? It’s happened to most of us.

Preparing participants is important to the success of follow up. Here’s a list of things I’ve done in the past that work. You may have others.

- Send a welcome letter or email that lists the objectives of the session. Provide a phone number or email address and encourage them to contact you with any questions.
- Get them involved early in tweaking the agenda by sending them a brief questionnaire that focuses on their unique needs.
- Call them and inform them of the objectives/purpose of the course. Ask if they have anything specific that they might like to have covered in the session.
- Even with the dismal results of assigned reading, that should not deter you from considering it. I have actually had more luck with asking participants to complete an action (rather than read an assignment), e.g., interview a couple of leaders, survey colleagues, ask co-workers for feedback.
- Speak with the participants’ managers/supervisors to determine what they want the participants to be able to do when they return. Encourage them to
speak with their employees prior to the session. You may wish to include discussion notes to the supervisor to address with the participant.

✓ Send an agenda and attach a note and telling participants how they can reach you.
✓ Send a puzzle, brain teaser, or cartoon that is pertinent to the session that arouses their curiosity.
✓ Send the logistics of the session: location of the site, room number, telephone number for emergencies, plans for lunch, email access, available parking, available public transportation, a roster of other participants, and other pertinent material that will help them feel comfortable and prepared about attending the session.

Preparing Yourself for a Successful Training

The better prepared you are the more smoothly your session will run and the fewer problems you should encounter. And even when something does go wrong your preparation will pay off because you will be better able to address it.

Here’s my quick checklist of what I do to prepare for the logistics for every training session.

✓ Review the training session thoroughly and list all the logistical details that need to be addressed. Create a checklist of these details and begin to address the items at least a week before the session.
✓ About this same time create a packing list of all the things you need to take to the training session with you.
✓ Complete all participant material and visuals early enough so that they can be proofed by someone else and corrections can be made.
✓ Learn who’s in your session to help you customize and plan the focus of your training. You might be able to learn their position, their understanding of the subject, the reasons they are attending, their opinions, any baggage they may bring with them, or negative concerns you might encounter.
✓ Check on your room about a week before your session. Rooms have a way of rescheduling themselves or double booking with other groups if you do not give them enough attention.
✓ Provide a detailed drawing of how you want the room to be set up. Don’t assume, however that it will be correct. I change my room set up more often than not. It seems that if you ask for a room to be set up for 20, facilities people think more is better and will set it up for 25. My problem with that is it appears that there were lots of “no shows.”
✓ Begin to make contact with those in charge of the logistics at least a week before to confirm that they have your requests on record. Contact them again the day before reminding them that you intend to arrive either two hours before the session begins, or the night before for final logistics. Remind them that you will want your AV set up so that you can try it out. Get the name and phone number of the contact person who will be available to let you in the room.
Arrive one to two hours before the session begins to set up materials, finish last minute details, tidy the room, rearrange furniture, set up and test equipment and anything else that crops up.

Due to the possibility of last minute crises, be sure that you are fully prepared and rehearsed and your materials are in ready-to-go order.

No amount of preparation will avert all the problems, but the better prepared you are, the better you will be able to address them.

Identifying Creative Ways to Practice

Practice makes perfect—or so my grandmother would say. As a trainer you have lots of things to practice. You can start with these.

✓ Practice setting up and debriefing the activities with colleagues.
✓ Practice the mechanics, such as if you need to use two kinds of audio visuals at the same time.
✓ Practice the theatrics if you tell a story with a punch line that needs certain pauses or inflection.
✓ Practice aloud to ensure you have no enunciation problems.
✓ Practice in the room where you will conduct the training so that you feel comfortable—so comfortable it becomes your room.
✓ Anticipate questions participants may ask and your responses to them.
✓ Practice the questions you will ask participants.
✓ Practice in several different ways:
  o In front of a mirror
  o To your colleagues
  o To your family, friends—even your dog (who will make great eye contact!)
  o With a tape recorder
  o In front of a camera

Practice and preparation can make your training session all that you had hoped it would be. To paraphrase Bob Pike from the beginning of this step, Publius Ovidus (43 BC - 17 AD) said,

“Practice is the best of all instructors.”
Personal Steps to Success

1. Create your own checklist for setting up a training room. Create your own checklist for delivering a webinar.

2. Interview supervisors and managers whose employees you train. Ask them for advice about how you might best prepare their employees for training sessions.

3. Start a file of all your checklists, packing lists, and other tools you use to prepare and get organized. At some point you can save time by creating your own lists and prompts that you will use over and over.

4. Put together your own training kit. Include a set of markers, masking tape, pen, scissors, index cards (useful for many things from assessment to evaluation), and other items you use and place them all in a small bag. Your kit will be ready to grab when you need to pack for a training session.

Elaine’s Procrastinator’s Checklist

Are you a procrastinator like me? Don’t have time to read this entire step? Here’s a quick and dirty checklist of what you need to do when.

One Week Before

- Practice your session in front of a colleague; ask for input, feedback and ideas.
- Know your subject cold. Your confidence will grow if you do.
- Memorize the words you intend to use during the first five minutes. The first few minutes are usually the most nerve-wracking for a trainer.
- Make a list of things you will want to remember to do or pack for the session: equipment, supplies, how to set up the room, what you will place at the participants’ seats, names and phone numbers of people who will support the session in any way, e.g., the person who has the key to the training room.
- If you asked participants to complete a survey or other pre-work, check to be sure you have all the responses.
- Confirm all room arrangements, refreshments, equipment, and supplies.

One Day Before

- Run through the entire session, practicing with visuals.
- Confirm that you have enough participant materials and all of your supplies.
- Check that you have your trainers’ guide or notes and keep it with you to take to the session.
- Check on everything you need regarding the training site including location of restrooms, refreshments, support staff, etc.
- Set up the training room, placing tables and chairs to encourage participation.
• Observe the room’s mechanicals. Will lighting cause any problems? Windows facing east or west? Determine where the light switches are located. Figure out where the thermostat is located and whether you have any control over it.
• Set up your equipment, marking placement of the projection table with masking tape on the floor. Test the equipment. Run through PowerPoint slides one last time to ensure they are in order. Practice with the actual equipment. Do you know where to find the wireless remote control? Do you know how to use it? Where is the reverse button? Can you roll the pages on the flipchart smoothly?
• Arrange the participant’s materials on their tables. Place their training manuals, pens, agendas, table tents, markers, and anything else each participant needs neatly at each seat. Place other shared materials they will need for small group activities or exercises in the center of round tables or equally spaced around a U or other linear placement. These items may include post its, index cards, handouts or paper.
• Take one last look around. Empty boxes in the front of the room? Get rid of them. Don’t depend on the clean-up crew to discard them for you.
• Get a good night’s sleep.

One to Two Hours Before
• Arrive at the training site at least one hour before start time.
• Complete last minute set up.
• Organize the space from which you will train.
  o Notes in order, turned to the first page, placed where you can stay organized.
  o Visual support is in order, placed where you want it.
  o Fill a glass of water.
  o Add a few paper towels for an emergency.
  o Tools and supplies where you want them: markers on the flipchart tray, pencil near your notes, post its and index cards at the side, completed table tent at the front of the table.
  o Ensure cords are covered or taped down.
• Media equipment placement is correct, tested, set to first slide.
• Make yourself comfortable: use the restroom, get a drink of water.
• Move around the room and greet people as they arrive up until two to five minutes before start time.

One Minute Before
• Take one more peek at your opening line.
• Take a deep breath.
• Tell yourself how phenomenal this is going to be.
• Find a friendly face.
• Smile.
• Go for it!

There you have it the long and the short of preparation—a list that is.

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