Educating the Epic End User

Facilitator's Guide
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# Chapter 0

## Facilitator Overview - READ ME FIRST!

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Facilitator Overview

Read this chapter in its entirety before attempting to use the remainder of this guide or facilitate the course.

Educating the Epic End User is an interactive DVD course. It provides trainers new and beneficial learning experiences as they prepare to teach their own end-user training courses.

As the course facilitator, you will orchestrate the class. This includes starting and stopping the DVD at appropriate times, asking questions or facilitating a group activity, and emphasizing important points that Jason makes on the DVD. This guide is a roadmap for exactly what you need to say and do; it’s a mirror-image of the workbook your learners will have, with the addition of facilitator specific information and answers to all the questions and activities. Think of it as a teacher’s guide that contains all the answers to the questions in the student’s book.

Basic Course Structure

There are three main components:

- The Educating the Epic End User DVD
- This Facilitator Guide
- Learner workbooks

Other than the six in-class activities that take place when the DVD is paused, the bulk of the learning occurs as the trainees watch Jason and simultaneously fill out their workbooks.

As a facilitator, your role is somewhat peripheral. You are responsible for starting and stopping the DVD, pointing out key elements of Jason’s presentation, asking questions, and facilitating class activities that correspond to the topics Jason covers in the DVD. You will also be teaching groups of students at various times when the DVD is stopped. But don’t worry – this guide will walk you through everything you need to say and do.

The entire course will take approximately 8 hours to complete.
Preparing for Class

The following steps are critical for facilitating this course:

- As the facilitator, you need to watch the DVD and practice with the facilitator’s guide at least once before facilitating the course. This will give you a chance to practice starting and stopping the DVD, get used to the icons in the facilitator’s guide, and get a better idea about the flow of the class.

- It is recommended that you have at least 6 learners before training this course. It’s not impossible to train it with fewer, but some of the activities will not be as effective if there aren’t at least 6 learners.

- Reserve a room with a computer that has the following:
  - A DVD drive. Note: The DVD cannot be viewed from a standard DVD player. It must be viewed through a computer DVD drive.
  - Windows Media Player 11 installed. If you do not have this version installed, the DVD will play but it will not look right on screen.
  - A sound card and speakers
  - Connected to a projector
  - A whiteboard and markers
  - Big stickies (large Post It notes)
  - Note that learners will not need access to computers for this class.

- Print a copy of this facilitator’s guide for yourself.

- Print a copy of the workbook for each learner.
How To Read Your Lesson Plan

This facilitator’s guide includes everything you need to facilitate Educating the Epic End User. Embedded within the guide is, essentially, a “copy” of your learners’ workbook. Information that appears in your trainees’ workbooks is plain, unformatted text, whereas your instructions and answers are formatted as such:

- Your instructions (what you need to know to facilitate/teach) are underlined.
- Your script (things you need to say aloud to the learners) is bolded and italicized.
- ANSWERS TO WORKBOOK QUESTIONS AND ACTIVITIES ARE CAPITALIZED (see also the Answers to Questions and Activities subsection below)

Facilitator Guide Icons

The following icons only appear in the facilitator’s guide and not the student’s workbook.

START DVD
This is your cue to start the DVD.

PAUSE DVD (End of track #)
This is your cue to pause the DVD. In parentheses is the track number just ended in case the DVD was stopped and not paused (in this case, start with the following track).

Workbook Icons

The following icons appear in the student’s workbook. Since the facilitator’s guide also contains everything the workbook does, you will see these icons in the facilitator’s guide as well.

Teaching tips that learners can incorporate into their planning and classes. The information in these boxes may or may not be covered by Jason on the DVD.
Facilitator Overview - READ ME FIRST!

In A Nutshell…
A brief description of the concepts that will be presented in the chapter, and their importance. This is the big picture for each lesson or topic.

Activity
The exercises and activities learners will be doing during class time. Unless otherwise specified in the individual activities, they will work on these when the DVD is not playing. You will typically stop the DVD so the learners can complete these activities.

As You Watch…
This section is dedicated to topics and important ideas presented in the DVD that require the learner to take notes while the DVD is playing. These will always be things Jason says during the DVD, and in many cases they are things he writes on the whiteboard or a big sticky. Space is provided for the learner to answer questions or record what is put on a sticky note or the whiteboard in the DVD.

The As You Watch icon (the eye) will flash in the upper right corner of the DVD screen about five seconds before Jason says the answer to the As You Watch question or fill-in-the-blank. Before starting the DVD, explain this to your learners so they are prepared to write down the As You Watch answers in their workbooks as the DVD is playing.

In some cases, Jason moves ahead to another As You Watch question before completely answering the current one, such as when there are multiple steps or answers to the question. Learners may need to flip back a page or two in order to finish answering an As You Watch section.

Note: The students need not concern themselves with reading the all text in each chapter as the DVD is playing. They can skim it if they wish, but it’s mainly there for after-class reference.

Apply Your Knowledge
The Apply Your Knowledge icon appears in the Review section of each chapter. Encourage your trainees to complete these sections on their own.
Answers to Questions and Activities

Students are frequently asked to answer questions while they watch the DVD, or record their ideas when they complete an activity. There are also review questions at the end of each chapter. Anywhere a question is asked or an activity completed, the facilitator’s guide contains the answers IN CAPITAL LETTERS. For example, look at the following ‘As You Watch’ section from the first chapter.

As You Watch…

Adults learn best when…

1. THEY KNOW WHY THEY’RE LEARNING

2. THEY CAN LEARN THROUGH PRIOR EXPERIENCE

Answers to activities are very similar. For example:

Activity: Successful Training & Curriculum – Part 3

The table below is for notes on additional points presented in the DVD that your group may not have thought of during part one of the activity.

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<tr>
<td>Class Notes:</td>
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<tr>
<td>● USE VARIED QUESTIONING TECHNIQUES</td>
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<td>● GET CLASS BACK ON TRACK</td>
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<tr>
<td>● HAVE A BETTER GRASP OF MATERIAL</td>
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Ensuring a Successful Class

Here are some tips and tricks we recommend you employ to ensure that the class goes well.

- Read the entire Facilitator’s Guide.
- Spend extra time preparing for the first activity in chapter 2. The activity is the biggest, most complex one of the class, and probably the most rewarding to the learners. Pulling it off successfully will require practice on your part. Read through your script numerous times, as well as the content each group will have to read. You may want to do a pilot run of this activity with some volunteers before you conduct the activity during the actual class.
- Use cartoons, DVD clips, or other humor techniques after class breaks. You may choose to use some of the materials Epic has included in Training Wheels. These are located in this folder structure on your Spring 2008 Training Wheels DVD: Training Wheels > General > Fun Things.
- In addition to watching the DVD and practicing with the facilitator’s guide, practicing in the actual room the class will be held in will be a big help. It will help you get any logistical issues corrected before class, as well as any technological issues (computer, projector, audio, etc.). You don’t want to have to worry about these issues the morning the class begins.
- Enjoy yourself! This should be a fun course to facilitate, and it can really help trainers be more successful in the classroom.
Facilitator Overview - READ ME FIRST!

Spring 2008
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Engaging Your Learners

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Reviewing the Lesson

Apply Your Knowledge
Before Starting the DVD…

Greet your learners and welcome them to class individually as they enter the room. As you greet them, tell them your first name, find out their first names, and write them on a seating chart when they sit down. Use this chart throughout the day to call them by their first name. By the end of the day try to have their names memorized.

When everyone has arrived, introduce yourself as the facilitator and use the following hook:

*In the not-too-distant future you will be in front of a group of end users. Some of those end users will be happy to be there, but some of them won’t. Regardless, you’ll need to effectively train each and every one of them. This DVD-based course, Educating the Epic End User, will teach you how to do so.*

Epic created this course based on a class they teach to their employees. The Trainer you’ll be watching in the DVD is Jason Teteak, one of Epic’s EpicCare Inpatient trainers. He has taught Epic to end users for 7 years. Before that, he taught high school English and mathematics for 7 years. He has a degree in Secondary Education, and now specializes in Adult Education.

The class is composed of 3 major elements: a workbook, a DVD, and activities that we’ll do while the DVD is stopped. Beyond these, your involvement as an active and engaged learner is crucial to the success of the class as a whole and to your individual success as a trainer.

You each have a workbook that you’ll use to take notes, answer questions and follow along with throughout the class. The workbook is yours to keep, so feel free to mark it up in any way you see fit. You can write or highlight anywhere in the chapter, and there’s also a blank page for notes at the end of each chapter if you need additional room.

Trainee Introductions

After greeting the students and giving them the above introduction to the course, have each student introduce themselves, giving you the following information (and anything else you’d like to know about them):

- Their name
- Their role
- Their background/area of expertise
- Something they want to get out of the class (a goal)

As the students tell you their roles/goals, add them to the seating chart you created earlier.
Classroom Logistics

Point out the location of the restrooms.

Notify the students that there will be breaks every 60-75 minutes, as well as an hour for lunch. Note: It is up to you, the facilitator, to incorporate class breaks as you see fit – they are not built into the facilitator guide.

Ask if the classroom environment is comfortable – is it too warm or too cold? Would they see the screen better with the shades drawn? Etc…

Review the Icons and Other Content

The chapters in your workbook are synchronized with the DVD, so you’ll use that to follow along during class. To help you follow along and keep you engaged, there are two icons you should watch for. Take a look at Workbook Images section in the Overview chapter.

Give them a chance to turn to that page.

Pay particular attention to two of the icons on this page: the eyeball and the jump roper.

The eyeball asks you a question you need to answer as you watch the DVD. In every case Jason will say the answer aloud, and in many cases they are things he writes on the whiteboard or a big sticky note. After you fill in the answer from the DVD, flip the page forward until you find the next eyeball. If you miss any of the answers, we can go over them when the DVD is stopped.

The jump roper icon indicates an activity where I’ll stop the DVD and we’ll do something as a group. Sometimes it will mean discussing something Jason just said, reviewing a question he just answered, or it might be a group activity.

You’ll also notice there’s extra text in this companion. In most cases, this text is an elaboration on something Jason discusses in the DVD. This text is not intended to be read while the DVD is playing. You can skim it if you wish, but you should be paying more attention to what Jason is saying and answering the eyeball questions rather than reading. I recommend you read the text after class.

Once and awhile Jason may make a reference to a page or chapter number – you can simply disregard those. The workbook in front of you is tailored to the DVD you’ll be watching, which is not necessarily the same one Jason’s trainees were using that day.

Questions

Give the students a chance to ask any questions before beginning the DVD.
START DVD

Instruct the students to turn to chapter 1 and start the DVD from the beginning!
Introduction

As a trainer you need juggle a lot of tasks at any given moment during training. You need to address the learning needs of all individuals in class, engage your learners and keep them active during the lessons, manage a classroom that may be full of challenging learners, and somehow remember everything you have learned and need to teach about the application and the job roles in your classroom.

In the course of this DVD lesson, you will learn how to enhance the training experience you offer to learners in a variety of ways.

- How to successfully interact with your learners to keep them engaged.
- How to develop credibility and rapport with your learners.
- How to better understand your learners’ styles of learning and information processing.
- How to develop teaching strategies to target individual learners’ needs.
- How to teach to multiple different types of learners simultaneously.
- How to handle challenging learners.
- How to capture your learners through lecture.
- How to know if your learners “got it.”
- How to improve your training evaluations.

Dual Roles

As you watch this DVD, keep in mind that you are playing dual roles - a learner experiencing Jason’s training and a trainer learning how to enhance your classroom. Pay careful attention to everything that Jason says and does throughout the DVD and see how he models what he is telling you to do in your own training.

As a trainer-to-be, your goal is to be able to teach others. Remember, simply watching this DVD is not enough. You will need to prepare lesson plans, and then practice your lesson and skills as many times as it takes until you’ve mastered them.
Hooking the Class

In A Nutshell…

An important factor in “hooking” your learners is to be aware of the audience composition. In order to successfully hook your learners you need to know what their role is, which will play into the goals that you elicit from them. For example, if you are teaching a group of nurses, it makes sense to be familiar with their admission workflow in advance and what goals they will have related to that, so that you can identify relevant topics quickly. This will also help you maintain credibility, even if you have no clinical experience.

Adults learn best when they know the topic is of immediate value and understand why they need to learn. A great way to hook your adult learners’ attention is to answer the “What’s in it for me?” question. You should have learned about their goals and responsibilities as you established rapport and credibility. Use that knowledge to explain how this class will meet their needs, like making their work faster and easier.

As You Watch…

Adults learn best…

1. WHEN THEY KNOW WHY

2. THROUGH PRIOR EXPERIENCES
Establishing Credibility and Rapport

There are lots of sayings about first impressions. All those sayings convey a similar idea – first impressions are important! Your chance to make a “first impression” during training is the first 15 minutes of your class. If you can engage your learners early on, you will be well on your way to a successful class. Use that time to build credibility, establish rapport, and grab their interest. At the end of those 15 minutes, your learners will fall into one of three categories:

- The hooked.
- On the fence. They’re not hooked yet, but are willing to keep listening.
- The disbelievers. Don’t give up – keep trying to hook them!

Credibility

In A Nutshell…

Credibility is key when working with adult learners. They need to know that you know what you’re talking about. Give your learners reason to believe in you as a trainer and be sure to state your credentials at the beginning of the class.

First, demonstrate that you understand their needs. Find out what their work responsibilities and goals are. Second, show them that you understand their responsibilities. In the first 15 minutes of class talk about their workflow and what they do, so that they know you understand their world. Third, show them that you can meet their needs - demonstrate how new information relates to their jobs and goals.

During the first 15 minutes of training, you should…

- Elicit their goals - address why the learners are here
- Establish credibility – why you are the one to meet their needs
- Build rapport - meet learners’ needs
- Hook the learners – captivate your learners so that they listen
As You Watch…
By the end of training, how do you know your learners “got it?”
1. COMPETENCY ASSESSMENT
2. TRAINER ASKS THE LEARNERS QUESTIONS
3. LISTEN TO THE LEARNERS’ QUESTIONS

PAUSE DVD
After Jason answers the above As You Watch, stop the DVD and make sure the students recorded the answers. Notify the class that from this point on, you’ll only stop the DVD after chapters 3 and 6 to go over any answers they missed.

START DVD
Start the DVD after you review the As You Watch questions.

Beginning to Build Rapport

In A Nutshell…
It’s not enough to know your stuff – learners also need to feel comfortable around you. Establishing rapport will enable them to ask questions and accept help when they need it.

Ways to Build Rapport
1. Meet the learners’ individual needs. You can do this by eliciting their goals and teaching to them.
2. Use humor.
3. Show that you care. An easy way to do this is to use learner’s names as you talk to them and refer to their contributions and comments.
4. Refer to the learners’ individual goals as you address them in class.
As You Watch…

The #1 fear of any learner is LOOKING FOOLISH IN FRONT OF:

1. OTHER LEARNERS
2. BOSS
3. PATIENTS/CLIENTS

As You Watch…

If a learner is struggling to learn or understand a topic, chances are it is because they were taught in a way they don’t LEARN.

PAUSE DVD (end of Track 1)

Pause the DVD when the activity instructions slide appears and do the following activity (Successful Training and Curriculum).

Instruct your learners to get into groups of four and to each assign themselves one of the following roles: Facilitator, Writer, Timekeeper, and Relayer.

Note: If you have an odd number of students, assign multiple roles to one student. (It is suggested that if you assign more than one role to a person, assign them timekeeper and presenter. If you assign two people to one role, assign them both to be Presenters as this role is easily shared.)

If you can, pause the DVD at the point when the corresponding activity slide is displayed – you may otherwise just write the roles on the board.

In your groups I’d like you to talk about two things: what makes a successful trainer, and what makes a successful training curriculum. You all have a specific role as you discuss – Facilitator, your job is to keep the conversation going; Writer, take notes on what’s being said; Timekeeper, keep the discussion at about 2 ½ minutes per topic; Relayer, you’ll share your group’s notes when we reconvene as a class.

Record any notes and discussion in the boxes provided in your workbook.

During the activity, walk around and make sure each group is completing their boxes. At the 5 minute mark, make sure each group is on question/box #3.

Before time is up, put big stickies up where you can write down the answers the groups came up with.

When time is up, reconvene as a class.
Let’s hear what you came up with for the first question, ‘What makes a good trainer?’ Presenters, what did you come up with?

Write each answer down, and tell the groups to write anything down they didn’t come up with. When there are no more answers for the first question, move on to the second question.

**Activity: Successful Training & Curriculum – Part 1**

Get into groups of four and assign each person one of the following roles.

- **Facilitator** – keep all group members involved and generate discussion.
- **Writer** – document the important points that will be presented at the end.
- **Timekeeper** – keep the group discussion at about 2.5 minutes per topic, and notify the group when there is 30 seconds left for each topic.
- **Relayer** – share the group’s information with the class.

### What Makes a Good Trainer?

**Group Notes:**

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### What Do You Want to Improve On as a Trainer?

**Group Notes:**

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## What Makes Good Training Curriculum?

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## What Do You Want to Improve On as a Training Curriculum Writer?

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### START DVD

Start the DVD after you’ve finished the activity discussion.
As You Watch…

Why do we include fun things after breaks?

MOTIVATE LEARNERS TO RETURN PROMPTLY FROM BREAK
Goals

What are goals? What is the difference between a goal and an objective? How do goals fit into your organization’s training curriculum?

Goals are what the learners really want or need to know to be able to perform their role. Objectives are what the trainer wants to teach them so that they can use Epic to perform their roles. This lesson will address the importance and methods of eliciting learners’ goals.

Eliciting Goals

In A Nutshell…

Eliciting goals from your learners is a fundamental part of building rapport. Addressing their goals will let them know why they are there, that you are attentive to their needs, and what they hope to take away from the class.

It is extremely important to elicit goals not just from the class as a whole, but also from each individual. This will demonstrate that the class is being taught especially for each individual, and that it is important to you to meet each person’s needs. Furthermore, this helps the learners know that what they are learning is of immediate value to them. At the end of the day you should be able to answer this question: “How do you know your learners got it?”

Eliciting Goals from Your Learners

1. Individual Goals
   - Begin with an icebreaker.
   - Ask each individual what their name, role and personal goal is for the class.
   - Write down each person’s goal on your seating chart.

2. Workflow Goals
   - Ask the class questions about the topics you’ll be covering. For example, you can say to a class of nurses: “When you first come onto a shift, what are some of the things you need to do?”
   - Write these down on a large sticky note, as they are pertinent to the whole class and their subsequent training.
   - If the goals offered by the learners are within the scope of the class, ask “Is it okay to use this goal as a foundation for today’s lesson/class?”

Make sure you know the basic workflow goals of the learners before you elicit the general workflow goals in class. This preparation will make it easier for you to
discern which goals are off-topic and will enable you to appropriately address them.

As You Watch…
What should you do with your learners’ goals?

1. WRITE THEM ON A LARGE STICKY NOTE
2. MAKE THEM THE SYLLABUS FOR CLASS
3. CHECK GOALS OFF AS YOU ADDRESS THEM

Responding to Goals

In A Nutshell…
How you respond to goals determines whether learners will keep participating and stay engaged during class. Positive responses will help the class feel comfortable volunteering and see the value in what you have to teach. At the same time, your responsibility as a trainer is to keep goals within the appropriate scope for the class.

Respond positively to all volunteered goals, even if a goal runs outside the scope of the class. Include this kind of goal with the others, but address it with the person off-line. Refer back to the goals throughout the class. Use them during discussions and check them off after they’ve been covered. At the end of the day, make sure the goals have been addressed and that each learner’s individual needs have been met.

Teaching Tips: Tap Into Learners’ Strengths
Learning new things is a little scary for everyone. Help your learners feel more confident by playing to their strengths:

- Treat them as peers
- Use their experiences as a resource; relate the new knowledge to familiar situations
- Recognize and respect their achievements and opinions.
- Treat all comments and questions with respect.
As You Watch…
What should you do if someone volunteers a goal that is outside the scope of the class?

1. WRITE THE GOAL ON THE CLASS GOALS STICKY NOTE ANYWAY
2. TALK TO THEM DURING BREAK/LUNCH
3. FIND ANOTHER PERSON TO ADDRESS THEIR NEED

Teaching Tip: What Do You Write on a Sticky?
Stickies can be a great teaching tool. But what’s useful to put on them? If you plan to use stickies, here are some ideas:
- Class goals
- Things you would assess
- Things learners can use right away in their jobs:
And remember – never stop talking while you write on a sticky.

As You Watch…
What is the trainer’s job?

1. MEETING EVERY LEARNER NEED YOU CAN
2. KEEPING THE LEARNERS ACTIVE

Parts 2-5 of the Successful Training & Curriculum activity are follow-ups to the first part that was completed in groups. The remaining activity questions are intended to be answered as Jason goes over them on the DVD.
Activity: Successful Training & Curriculum – Part 2

The table below is for notes on additional points presented in the DVD that your group may not have thought of during part one of the activity.

What Makes a Good Trainer?

<table>
<thead>
<tr>
<th>Class Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• GENUINE ENTHUSIASM</td>
</tr>
<tr>
<td>• CONTENT KNOWLEDGE (90/10 RULE)</td>
</tr>
<tr>
<td>• HONESTY ABOUT KNOWLEDGE – ESTABLISH LIMITS BEFOREHAND; KNOW THE CORE CONTENT; BACKPOCKET INFO</td>
</tr>
<tr>
<td>• GOOD PACING – FOR BOTH FAST AND SLOW LEARNERS</td>
</tr>
<tr>
<td>• ORGANIZED</td>
</tr>
<tr>
<td>• READ LEARNER CUES</td>
</tr>
</tbody>
</table>

As You Watch…

The 90/10 Rule…

90% of a trainer’s energy should be focused on _LEARNERS_, and the remaining 10% on _CONTENT_.

As You Watch…

How many times should you practice your lesson plans?

AS MANY AS IT TAKES UNTIL YOU’VE GOT IT

Teaching Tip: Back-Pocket Knowledge

Every time you teach a lesson, the same questions come up. These questions are not necessarily within the scope of your teaching, so how do you deal with them?

Anticipate your learners’ questions and have that knowledge ready – this is your back-pocket information.
As You Watch…

Why should you use the circle of knowledge?

1. TAKES AWAY THE FEAR OF NOT KNOWING THE CORRECT ANSWER

2. CLEARLY DEFINED ROLES ENSURE CLASS PARTICIPATION IN DISCUSSIONS

Activity: Successful Training & Curriculum – Part 3

The table below is for notes on additional points presented in the DVD that your group may not have thought of during part one of the activity.

<table>
<thead>
<tr>
<th>What Do You Want to Improve On as a Trainer?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Notes:</td>
</tr>
<tr>
<td>• USE VARIED QUESTIONING TECHNIQUES</td>
</tr>
<tr>
<td>• GET CLASS BACK ON TRACK</td>
</tr>
<tr>
<td>• HAVE A BETTER GRASP OF MATERIAL</td>
</tr>
</tbody>
</table>

Objectives and Audience

In addition to knowing your learners’ goals for class, truly understanding your audience and your objectives for the lesson will help you create beneficial training curriculum and help you succeed as a trainer.
Activity: Successful Training & Curriculum – Part 4

The table below is for notes on additional points presented in the DVD that your group may not have thought of during part one of the activity.

### What Makes Good Training Curriculum?

<table>
<thead>
<tr>
<th>Class Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• GOOD EXAMPLES: HOW, WHY, AND WHAT</td>
</tr>
<tr>
<td>• ACCURATE CONTENT</td>
</tr>
<tr>
<td>• SMOOTH SEGUES</td>
</tr>
<tr>
<td>• LOGICAL ORDER</td>
</tr>
<tr>
<td>• EASY TO FOLLOW</td>
</tr>
<tr>
<td>• EFFECTIVE TRAINER</td>
</tr>
<tr>
<td>• VARIED TEACHING STRATEGIES</td>
</tr>
<tr>
<td>• MEASURABLE OBJECTIVES</td>
</tr>
<tr>
<td>• DOCUMENTATION REINFORCES TRAINING</td>
</tr>
</tbody>
</table>

As You Watch…
What is an objective?

1. BY THE END OF TRAINING, LEARNERS SHOULD BE ABLE TO…

2. ASSESSABLE

As You Watch…
What is a goal?

WHAT THE ADULT WANTS TO KNOW OR DOES IN THEIR EVERY-DAY ROLE.

As a trainer, you need to know your objectives before you begin to teach a class. If you know your objectives in advance you can be sure to address them. This is an integral part of a worthwhile training, as learners are evaluated on these objectives during competency assessments. Your lesson plans should address your
objectives, and the teaching strategies you employ will communicate your lesson plans. Ultimately your pre-planned objectives should fit into the learners’ goals.

Roles: end user/audience

Goals: what you elicit from your learners

Objectives: what the end users need to know by the end of class

Three Types of Objectives

1. Conventions – tell learners what
   “Define this…”
2. Algorithm – tell learners how
   “Describe the steps to…”
3. Concept – tell learners why
   “Explain or diagram…”

Often there is no why to follow the how, which can be frustrating for learners. Additionally, the how is easy for learners to forget.

As You Watch…
Always put _CONCEPTS_ before _ALGORITHMS_ and _CONVENTIONS_ in your lesson plans, because concepts help learners remember the algorithms.

As You Watch…
Every 7 minutes the _TRAINER_ should change what he is doing; Every 20 minutes the _LEARNER_ should be doing something different.
Activity: Successful Training & Curriculum – Part 5

The table below is for notes on additional points presented in the DVD that your group may not have thought of during part one of the activity.

<table>
<thead>
<tr>
<th>What Do You Want to Improve On as a Training Curriculum Writer?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Notes:</td>
</tr>
<tr>
<td>● WRITING A LESSON PLAN WITH OBJECTIVES, TEACHING STRATEGIES</td>
</tr>
<tr>
<td>● CONSISTENCY</td>
</tr>
<tr>
<td>● PACING</td>
</tr>
</tbody>
</table>

**How long should you wait for learners to respond to a question?**

It takes approximately 7 seconds for a learner to be able to share a question with the class.

- 1-2 seconds to process the question invite
- 3-4 seconds to decide what question to respond with
- 1-2 seconds to get the nerve to actually respond

This may seem like a painfully long time when you are the trainer in front of the class, but it is important for the learners to have this time available. Asking *what* questions the learners have (instead of *if* they have questions) may even shorten the time it takes for someone to respond, as the learner may be able to skip the processing step above.

**TURN TO CHAPTER 2**
Reviewing the Lesson

Be prepared to do the following in the first 15 minutes:

1. Elicit your learners’ personal and workflow goals.
2. Grab learners’ attention and interest with a hook that applies to their goals.
3. Demonstrate your credibility regarding the class material.
4. Establish a friendly, comfortable rapport.

Apply Your Knowledge

1. How did Jason incorporate humor into class?
   USED FUNNY SLIDES AFTER BREAK

2. Identify some of the things Jason did to establish rapport with his learners.
   QUICKLY LEARNED FIRST NAMES
   REFERRED BACK TO LEARNERS’ GOALS
   USED HUMOR

3. After eliciting goals the goals of his learners, what did Jason do with them? Why?
   HE WROTE THEM ON A BIG STICKY SO THAT HE COULD REFER
   BACK TO THEM DURING CLASS IN ORDER TO MEET LEARNERS’ NEEDS
Notes: Engaging Your Learners
Chapter 2
Understanding Your Learners

The Learning Process 2

The Four Learning Styles 4
   Activity: Teach the Learning Style to the Learner 5
Self-Expressive Learner 6
Mastery Learner 7
Interpersonal Learner 9
Understanding Learner 10

Teaching Tools 12
The Buddy System 12
Benchmark Checks 12

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The Learning Process

After you have hooked your learners into the lesson, established your credibility, begun building rapport, and elicited goals, you need to actual begin teaching them the content of the lesson. However, teaching an effective lesson is not just as “easy” as choosing the right teaching strategy.

The success of any lesson depends on numerous factors, including the general process of how knowledge is acquired, the abilities and learning preferences of your learners, and the content of your lesson. In this chapter you will learn about the stages of adult learning and the learning styles that shape how well your learners acquire the material you are teaching. Furthermore, there are several things that you can do in your presentation of the content to make the lesson more effective.

Teaching Tip: Knowing Your Audience
Pay attention to the type of audience you are training, because their specific role or roles may gravitate towards one learning style. For example, a room full of pharmacists would tend to be organized and meticulous, making them likely to be understanding learners and, in some cases, mastery learners as well.

As You Watch…

What are the Four Stages of Learning?

1. WHAT IS THE TRAINER DOING
2. I CAN SEE WHAT HE IS DOING
3. I CAN DO THIS MYSELF
4. I CAN TEACH THIS TO OTHERS

Teaching Tip: The 4 Stages of Learning In Your Classroom

- By the end of training, your learners should minimally be at stage 2.
- How do you know if your learners got it? If they reached to stage 3.
- Allowing your learners to become active in the teaching and learning process will aid in getting them to stage 4.
As You Watch…
What are five characteristics to embody when speaking in public (or while training)?

1. CONFIDENCE and ENTHUSIASM
2. PROJECTION
3. BODY LANGUAGE
4. EYE CONTACT

As You Watch…
What are the 3 stages of trainer development?

1. CONTENT
2. PRESENTATION SKILLS
3. CLASSROOM MANAGEMENT
The Four Learning Styles

In A Nutshell...

There are four learning styles that individuals use to absorb new information. Because each of these learning styles is unique, they each demand their own modification from a trainer. In order for each learner to reach to his or her maximum potential, each must be trained in accordance with his or her learning style. Thus, the goal of all good training is to use multiple teaching strategies to reach multiple learning styles.

Keep in mind that learning styles are how people learn and not the ways in which they are intelligent.

Have the class divide as equally as possible into four groups. (For this activity, it doesn’t matter how many people are in each group.) After they’ve gotten into groups, assign each one a learning style: Mastery, Interpersonal, Understanding, and Self-Expressive.

For this activity you’re going to divide into four different groups. After you’ve done so, I’m going to come around and assign your group a learning style – Mastery, Interpersonal, Understanding or Self-Expressive. Go ahead and form your groups.

As they do so, assign each group a learning style.

Your group’s goal for this activity is to teach the rest of the class the key points of a learning style. There’s another element to this activity, however – you must teach it as if you were teaching a group of students who all learn in the style about which you are teaching. For example, if you were assigned the Mastery learning style, teach the class about Mastery learning in a way that would be especially effective for a Mastery learner.

Turn to the learning style descriptions in your workbook. With your group, familiarize yourselves with the learning style to which you’ve been assigned. Pay close attention to the ways in which that particular learning style likes to be taught.
As a group, figure out what key points about the learning style you’d like to emphasize. Don’t forget to also think about in which ways you will present the information – this is just as important as the information you’ll be sharing. You may write down your group notes in the corresponding learning style notes sections.

Pick one or two people from your group to act as the trainers to teach the class. I’ll give you 30 minutes work on this.

As they brainstorm, walk amongst the groups and give them tips on how they can incorporate different methods of teaching. (This is the more difficult part of the activity.) Make sure each group has at least two different ways in which they will teach to their assigned learners.

**Activity: Teach the Learning Style to the Learner**

Divide into four groups within your class. Your facilitator will assign each group one of the four learning styles:

- Mastery
- Interpersonal
- Understanding
- Self-Expressive

Your goal for this activity is to teach the class about the learning style assigned to your group. However, you must do it as if you were teaching to a group of students who all learn in the style in which you are teaching (for example, you are teaching the Mastery Learning style characteristics to a class full of Mastery learners).

As a group, familiarize yourselves with the learning style you have been assigned by reading the information in this chapter. Pay particular attention to how to effectively teach to your learning style, including methods, likes, and dislikes. Make sure to plan not only what you will say about the learning style, but also how you will present the information.

Use the note-taking boxes following each learning style summary to take notes as the groups in your class present and when Jason reviews the activity on the DVD.

Have each of the groups present their information to the rest of class. After each presentation, facilitate a short class discussion:

*How did the last group present in ways that [Mastery, Understanding, Interpersonal, or Self-Expressive] learners would like?*
Does anyone have any other ideas on how other techniques or teaching methods could have been incorporated?

Self-Expressive Learner

The Intuitive-Feeling Learner

PREFERS TO LEARN BY:

- Being creative and using his imagination
- Planning and organizing work in creative ways
- Working on a number of things at one time
- Searching for alternative solutions to problems, beyond those normally considered – divergent thinking
- Discussing real problems and looking for real solutions

LEARNS BEST FROM:

- Creative and artistic activities
- Open-ended discussions of personal and social values
- Activities that enlighten and enhance, such as myths, human achievement stories, dramas, etc…

LIKES:

- Contemplation and imaginative thinking
- Being able to learn through discovery
- Opportunity to plan and pursue individual interests
- Recognition for personal insights and discoveries
- Imagery
- Creative problem solving

DISLIKES:

- Too much attention to detail
- Facts, memorization, rote-learning
- Tasks with predetermined correct answers
- Detailed and demanding routines

ENJOYS ACTIVITIES THAT FOCUS ON:

- Hypothesizing
- Synthesizing
• Symbolizing – metaphorical expression

Notes: Self-Expressive Learners

Mastery Learner

The Sensing-Thinking Learner

PREFERS TO LEARN BY:

• Seeing tangible results
• Practicing what was learned
• Following directions one step at a time
• Being active rather than passive
• Knowing exactly what is expected, how well the task must be done, and why

LEARNS BEST FROM:

• Drill and repetition
• Demonstration
• Direct Instruction
• Guided practice exercises
• Hands-on experience

LIKES:

• Doing things that have immediate and practical use
Understanding Your Learners

- Being acknowledged for thoroughness and detail
- Praise for prompt and complete work
- Competition
- Immediate feedback (rewards, privileges, etc.)

DISLIKES:
- Completing tasks for which there are no practical uses
- Activities that require imagination and intuition
- Activities with complex directions
- Open-ended activities without closure or pay-off
- Activities that focus on feelings or other intangible results

ENJOYS ACTIVITIES THAT FOCUS ON:
- Organizing and managing information
- Practicing a skill
- Observing
- Describing
- Memorizing
- Categorizing

Notes: Mastery Learners
Interpersonal Learner

The Sensing-Feeling Learner

PREFERS TO LEARN BY:
- Studying about things that directly affect people’s lives rather than impersonal facts or theories
- Receiving personal attention and encouragement from instructors
- Being part of a team – collaborating with others
- Activities that promote and encourage self-discovery and understanding

LEARNS BEST FROM:
- Group experiences and projects
- Loving attention
- Personal expression and personal encounters

LIKES:
- Receiving personal attention and encouragement
- Opportunities to be helpful in class
- Personal feedback
- Sharing personal feelings and experiences with others

DISLIKES:
- Long periods of working alone silently
- Emphasis on factual detail
- Highly competitive games where someone loses
- Detailed and demanding routines

ENJOYS ACTIVITIES THAT FOCUS ON:
- Describing feelings and empathizing
- Responding
- Valuing
- Role-playing
- Team games
- Learning circles and peer-tutoring
Notes: Interpersonal Learners

Understanding Learner

The Intuitive-Thinking Learner

PREFERS TO LEARN BY:

- Studying about ideas and how things are related
- Planning and carrying out a project of his own making and interest
- Arguing or debating a point based on logical analysis
- Problem solving that requires collecting, organizing, and evaluating data

LEARNS BEST FROM:

- Lectures
- Reading
- Logical discussions and debates
- Projects of personal interest

LIKES:

- Time to plan and organize work
- Working independently or with other understanding learners
- Working with ideas that challenge one to think, explore, and master

DISLIKES:
Routing or rote assignments

- Memorization
- Concern for details
- Rigid rules and predetermined procedures

ENJOYS ACTIVITIES THAT FOCUS ON:
- Classifying, analyzing, and evaluating
- Problem solving and logic problems
- Comparing and contrasting
- Writing essays and concept-formation

Notes: Understanding Learners

Did you know that trainers tend to teach in the same way that they learn? This is a dangerous tendency, as you could alienate up to 75% of your learners if they are not of the same learning style. As an appendix to this workbook, we have included a Learning Style Assessment. Understanding your own learning style will be invaluable to you as you choose teaching strategies for your curriculum.

START DVD

Start the DVD after all groups have presented and the corresponding classroom discussions have taken place.
Teaching Tools

Does your lesson target all four types of learners? If not, you need to do something to ensure all four styles are targeted. The following chapter will introduce you to the idea of teaching strategies and suggest when certain ones are best used. However, teaching tools are small-scale ways to supplement your lesson and make a big impact on your learners, especially if they are of a learning style that is not commonly addressed.

It is not possible to target all learning styles all of the time, but it is possible to target all learning styles in every lesson at some point during. It is very important that every learning style be addressed in every lesson.

The Buddy System

The Buddy System can be used whenever the presentation involves multiple, key steps that will impact what you or your learners do later in the lesson. The Buddy System ensures that if someone misses one of these steps during a particular workflow, they will have sufficient support from someone other than you to help them to get caught up with the workflow and the class.

This informal tool can help build a relationship between desk mates, and often times perpetuates the same kind of help during individual exercises. However, it’s important to not put too much emphasis on the Buddy System as a requirement, so that your learners don’t feel patronized or that they are being baby-sat.

**How to use:** As the trainer presents the steps with which learners are following along, he or she should ask everyone to check his or her screen for X and then look at the screen of the person next to him and, if necessary, offer suggestions.

Benchmark Checks

Benchmark checks are questions asked of the learners at various stages of an exercise to ensure that they are understanding the lesson. These questions may ask the learner to show the trainer that they have done something correctly in the system, but they also should include conceptual and conventional questions to make sure that they understand why they did what they did. The trainer should use the responses to these questions to assess whether the learners need one-on-one help.
Recap of Learning Styles

As You Watch...

Write the four learning styles in the appropriate quadrants below:

Jason’s personal learning styles are graphed to the left. It looks like he is a self-expressive and an interpersonal learner. How has he taught to those types of learners today?
• Jason has taught to **self-expressive learners** by allowing you to plan a presentation in which you were able to create and present the information. He also has you work on multiple tasks at one time, such as taking notes, listening to him speak, and answering questions.

• Jason has taught to **interpersonal learners** by allowing you to work in groups and share ideas, experiences, and concepts. These tasks have helped you learn from and with each other.

• Jason has successfully taught to **mastery learners** by using a workbook with predefined flows that have sections, subsections, and many opportunities for you to practice what you’ve learned. Also, the steps written on the stickies provide you with tangible things to write down.

• Finally, Jason has taught to **understanding learners** by allowing you to do what you are doing right now: reading and investigating on your own using this workbook. It has allowed you to study, debate, and problem solve, and then have discussions in small groups and with the entire class, which allows you to come to your own conclusions.

<table>
<thead>
<tr>
<th>PAUSE DVD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pause the DVD and begin the Activity (What Is It Like to Be a Learner?).</td>
</tr>
</tbody>
</table>

*Class, I’d like you to take five quiet minutes and write about a time when you learned something.*

After the class completes the activity, ask for volunteers to share what they wrote. Be sure to ask about **why** they were able to learn the skill or knowledge effectively.
Activity: What Is It Like to Be a Learner?

Take 5 minutes to write about a time when you learned something. Describe what you learned and what happened that enabled you to learn it well.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

START DVD

Start the DVD after you’ve completed a brief classroom discussion on your learners’ responses to “What is it like to be a learner?”

TURN TO CHAPTER 3
Reviewing the Lesson

The Four Learning Styles

- The Mastery Learner – steps and repetition
- The Interpersonal Learner – group work
- The Understanding Learner – read and discuss
- The Self-Expressive Learner – create to learn

Apply Your Knowledge

1. From what you have learned in this chapter, take a guess at your personal learning style. Give an example of when your learning style enabled you to learn something easily.

2. To which learning styles do you feel most comfortable teaching?

3. As a trainer, why is it crucial to be aware of your personal learning style?
Notes: Understanding Your Learners

________________________________________________________________________

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Chapter 3

Teaching Strategies

The Basics  2
Inviting Questions  3
Body Language  4

Teaching Strategies for Your Classroom  6
Direct Instruction  6
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Jigsaw  9
Circle of Knowledge  11
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The Basics

If you don’t let your learners struggle, you are doing them a huge disservice. Why? Letting your learners “fail” when you are there to help them and put them back on track can actually further their learning. But if the first time the “training wheels come off” is at go-live, they won’t have the opportunity to learn from their mistakes in a controlled environment.

As You Watch…

Adults learn best…

1. When they know why
2. Through prior experience
3. THEY CAN LEARN THROUGH PROBLEM SOLVING
4. THEY KNOW THE TOPIC IS OF IMMEDIATE VALUE

As You Watch…

What is a teaching strategy?

A MEANS/MODE OF DELIVERING TRAINING OBJECTIVES

Teaching Tip: Learning Styles & Teaching Strategies

The people in your audience will dictate which teaching strategy you should use, because they will each gravitate toward a style of learning. Even though there may be one or two learning styles more prevalent in your classes, you will always encounter all four styles to some degree. Be sure to teach to all of them!
As You Watch…

How do you determine the teaching strategies to use in your classroom?

1. OBJECTIVES
   - Type
   - Time available

2. GOALS

3. AUDIENCE
   - Role

4. STORY
   - Makes the training come alive

5. AVAILABLE STRATEGIES

6. LEARNING STYLES

7. SUPPLEMENTAL STRATEGIES
   - To target all learning styles

8. TOPIC PRIOR TO/AFTER
   - 7/20 Rule

9. EXPERIENCE

Teaching Tip: Choose Carefully

Choosing a particular teaching strategy can instantly alienate or engage certain types of learners.

Inviting Questions

As trainers, we like to ask the class for questions to make sure everyone is on the same page and to encourage active participation. But if we aren’t careful, we can set up learners to feel foolish just in the way that we phrase our invitation for questions. There are two basic ways to invite learners to share their questions.

“Does anyone have any questions?”

If you ask for questions this way, you set learners up to look foolish because they will feel like they are admitting they “don’t get it.” This also gives them the
Teaching Strategies

ability to simply respond with “yes” or “no,” which doesn’t really get the questions out into the open.

“What questions do you have?”

Asking the learners what questions they have assumes that they do, establishes that it is okay, and even encourages questions. Further, phrasing the statement like this eliminates the learners from being able to say simply yes or no, they can jump straight to the heart of their question.

Remember to allow your learners enough time to process and share their questions. Wait seven seconds from the time you open the floor for questions until you decide that no one has anything to ask.

Body Language

Body language is an important element of your teaching style to consider. The wrong movement or body position can distort your message to learners, and it can damage the rapport you have established with them.

As You Watch…

How does your body language affect your training?

1. What are you implying if you walk backwards while answering a question?
   I DON’T CARE OR DON’T KNOW THE ANSWER

2. What can happen if you walk all the way up to the learner while answering a question?
   MIGHT INTIMIDATE THE LEARNER

3. What if you are constantly walking around while answering a question?
   MAKE THE LEARNER NERVOUS

4. Why shouldn’t you stand over a learner who is seated when offering assistance or answering a question?
   LEARNER MIGHT FEEL INFERIOR
Taking one step forward is the best approach when you are answering the learner’s question in for the benefit of the entire class. Getting down on one knee puts you at the learner’s level and shows that you care about their needs. This is best used for situations and questions that require individualized responses.

### Teaching Tip: Computer Help

Never take the mouse or keyboard from a learner to show them how to do something in the system. Instead, talk them through the steps while they continue to maneuver in the system. If you take the mouse, you are silently telling them they can’t do it and are potentially shutting down their learning.
Teaching Strategies for Your Classroom

In A Nutshell…

There are a number of teaching strategies that work best with an individual learning style, as well as strategies that address a combination of learning styles. This chapter will introduce several effective teaching strategies you can employ in your classroom. The most important and useful teaching strategy you will discover in this course is called the New American Lecture. It is introduced at the end of this chapter and is covered fully in the next chapter.

Use this table to help you understand the descriptions of each teaching strategy and how they address different learning styles.

<table>
<thead>
<tr>
<th>Learning Styles Matrix</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>X</strong> = emphasized through this strategy</td>
</tr>
<tr>
<td>*** =** expressed through this strategy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mastery (Sensing-Thinking)</th>
<th>Interpersonal (Sensing-Feeling)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding (Intuitive-Thinking)</td>
<td>Self-Expressive (Intuitive-Feeling)</td>
</tr>
</tbody>
</table>

Direct Instruction

Direct Instruction by itself only targets Mastery learners.

| X |

If you only teach with Direct Instruction, you will only address the Mastery learners. In the DVD, Jason will demonstrate how you could modify the teaching strategy to accommodate other learning styles by using additional teaching tools.

In Direct Instruction the instructor models the skill and provides feedback during directed, guided, and independent practice to help students achieve mastery of the
skill. This strategy is the most popular method of teaching in college lectures, and is therefore commonly known simply as lecture.

**As You Watch...**
Before you teach with Direct Instruction, make sure you address the:

CONCEPTS

**As You Watch...**
The grid below shows how Direct Instruction targets only Mastery learners within the example situation. Finish filling it out as Jason provides examples of other techniques that will supplement Direct Instruction to address the remaining learning styles.

**Algebra Problem**

<table>
<thead>
<tr>
<th>Model</th>
<th>BUDDY SYSTEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show steps</td>
<td>USE VISUAL MODEL (SCALE EXAMPLE) IN PAIRS</td>
</tr>
<tr>
<td>Give guided practice</td>
<td>COMPLETE STEPS INDEPENDENTLY</td>
</tr>
<tr>
<td>Give independent practice</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCENARIO/STORY</th>
<th>CREATE OWN SCENARIO</th>
</tr>
</thead>
<tbody>
<tr>
<td>USE VISUAL MODEL (SCALE EXAMPLE)</td>
<td></td>
</tr>
</tbody>
</table>

**Teaching Tools**
Below is a list of tools you can use to modify the Direct Instruction teaching strategy to accommodate other learning styles.
Big Picture
- Gives the learners the big picture of either the course, or a piece of the course, before the presentation even occurs.

Buddy System
- A system used whenever the presentation involves multiple key steps that will impact what you do later in the presentation.
- If someone misses a key step during a workflow, they have a partner to help them get caught up and back on track.

Concept/Convention before Algorithm
- An approach to teaching certain types of difficult topics that have multiple types of objectives.
- The trainer first addresses the concepts and conventions of the presentation, and then teaches the algorithms (steps) of the topic itself.

Directional Statements
- Engages learners and keeps them active.
- A simple command to keep your learners focused on what is going on in the classroom.

Divide and Conquer
- An approach to teaching long, complicated, multi-step administrative build topics modeled after “real life” build in a typical install.
- The learners build something basic and immediately test it, and then see what is missing. Subsequent steps are based off of those missing pieces.

Manipulatives
- A literal hands-on tool, which allows learners to manipulate objects in different ways to help understand and visualize challenging concepts.

Note-Taking Devices
- Give learners a structured “template” to take notes on throughout the course of the lesson, visually depicting where things should be written down, and how the information relates.

Big Stickies/Word Documents/Whiteboard
- Used to capture the important information presented to the learners so that they can focus on the learning and content, without having to worry about how or when to take notes, or missing much of what you have to say.
Once captured, this information is stored for later reference during and after class, resulting in better knowledge retention and involvement from the class.

**Questioning Techniques**

- A series of questions designed to encourage dialogue and discussions from your learners during the presentation.
- Keeps learners engaged throughout an entire day of training.

**Learners Direct Trainer**

- Builds off of what the learners already know by allowing them to guide the presentation by suggesting next steps to achieve an end result.

**Visual Aids**

- Used to visually display a concept or an algorithm that is otherwise difficult to explain/learn by discussion alone. (Slideshows, diagrams, etc…)

**Jigsaw**

Jigsaw by itself only targets Interpersonal and Understanding learners.

\[
\begin{array}{c|c}
X & X \\
\hline
X & X \\
\end{array}
\]

If you **only** teach with Jigsaw, you will **only** address the Interpersonal and Understanding learners. In the DVD, Jason will demonstrate how you could modify the teaching strategy to accommodate other learning styles by using additional teaching techniques.

The Jigsaw activity is a cooperative learning strategy. The class works in research teams made up of learners who are responsible for researching subtopics of larger topics. The experts from each research team meet to discuss their findings and come to specific conclusions about their subtopic. The class then forms new teams, sharing teams, in which they communicate their research findings to those who haven’t researched a particular subtopic.
As You Watch…
What is the key to making Jigsaw work?
ASK YOUR LEARNERS HOW THEY LEARN.

Teaching Tip: Teaching vs. Helping/Sharing
Don’t tell learners that they are teaching each other during the second part of a Jigsaw activity. Instead, emphasize that they are just “helping each other learn” or “sharing information.”
Although learners want to feel like they have some control in the classroom, they still want to know that you are doing most of the instructional “work.”
As You Watch…

The grid below shows how Jigsaw targets only Interpersonal and Understanding learners within the example situation. Finish filling it out as Jason provides examples of other techniques that will supplement Jigsaw to address Mastery and Self-Expressive learners.

**Physician Rounding Flow**

- SUMMARY AT END
- LOTS OF STRUCTURE
- STEPS
- Group work
- Research/Reading
- Big Picture
- Teach
- Class Discussion
- COME UP WITH THEIR OWN QUESTIONS

**Circle of Knowledge**

Circle of Knowledge by itself only targets Self-Expressive, Interpersonal and Understanding learners.

\[
\begin{array}{c|c}
X & X \\
\hline
X & * \\
\end{array}
\]

If you only teach with Circle of Knowledge, you will only address the Self-Expressive, Interpersonal and Understanding learners. In the DVD, Jason will demonstrate how you could modify the teaching strategy to accommodate other learning styles by using additional teaching techniques.
This teaching strategy has 3 phases:

1. **Groups** - form groups of four and assign each person in the group one of the following roles.
   - **Facilitator** – keeps all group members involved and generates discussion.
   - **Writer** – documents the important points from discussion.
   - **Timekeeper** – keeps the discussion from exceeding the allotted time.
   - **Relayer** – share the group’s information with the class.

2. **Visual Organizer** – anything from a large piece of paper for taking notes to a structured diagram or chart to fill in. This allows the learners to document their group’s ideas and gather additional information as each group shares their thoughts.

3. **Discussion** - Any question a learner wants to ask will come out in this phase, because phase one got everyone into small groups for idea generation. This targets all 4 learning styles, in part by keeping all learners active. The learners run the show, and dictate the discussion phase (or at least they think they do).

   During this discussion phase, the trainer still maintains the role of the discussion facilitator, and can still do a lot of new teaching, but discussions are stimulated by and originate from the learners now, rather than the trainer. This makes the learners feel more empowered in the classroom. By sharing control like this, you improve rapport as well as maintain good discipline in a classroom when dealing with experts, hecklers, and resenter. (See the Challenging Learners chapter for more information on these types of individuals.)
As You Watch…

The grid below shows how Circle of Knowledge targets only Interpersonal, Understanding, and Self-Expressive learners within the example situation. Finish filling it out as Jason provides examples of other techniques that will supplement Circle of Knowledge to address the Mastery learners.

### Summary Activity from Chapter 1

<table>
<thead>
<tr>
<th>ROLES</th>
<th>Timeframe</th>
<th>Structured</th>
<th>Place to Write</th>
<th>Review at the End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work in groups</td>
<td>Focus question</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Independent thinking</td>
<td>Creative: come up with own ideas without being given steps ahead of time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read/Analyze</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Debate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Teaching Tip: Strategies and Tools**

When you pick a teaching strategy, make sure you choose one that hits all four learning styles. If you can’t do that – supplement with another strategy or teaching tool.


**Etch-a-Sketch**

Etch-a-Sketch is a teaching tool, not a teaching strategy. Use an Etch-a-Sketch to supplement a teaching strategy that does not address the needs of a Mastery, Interpersonal, or Self-Expressive learner.

An Etch-a-Sketch is a note-taking device for key ideas and important details. Essentially, it gives learners a structured “template” on which to take notes throughout the course of the lesson, visually depicting where things should be written down, and how these notes relate to the accompanying information in the lesson. The form of an Etch-a-Sketch can vary from a table or chart, to items like the As You Watch section and blank lines for note-taking found in this workbook.

---

**As You Watch…**

Finish filling out the grid below as Jason provides examples of other ways to address the Understanding learners when using an Etch-a-Sketch.

<table>
<thead>
<tr>
<th>Provides structure</th>
<th>Personal sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Categorize</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Imagery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open-ended discussion</td>
</tr>
<tr>
<td>Write what they want</td>
</tr>
</tbody>
</table>
Circle

Circle by itself only targets Interpersonal and Understanding learners.

<table>
<thead>
<tr>
<th></th>
<th>X</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td></td>
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</tbody>
</table>

If you only teach with Circle, you will only address the Interpersonal and Understanding learners.

In the Circle strategy, students sit in a circle and are invited to share interpersonal information. The trainer then asks circle members to review what they heard, to look for similarities and differences, and then to draw conclusions about what was shared. This strategy can be used in small groups or for the class as a whole.

Role Playing

Role Playing by itself only targets Self-Expressive, Interpersonal and Mastery learners.

<table>
<thead>
<tr>
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<th>X</th>
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</thead>
<tbody>
<tr>
<td>*</td>
<td>X</td>
</tr>
</tbody>
</table>

If you only teach with Role Playing, you will only address the Self-Expressive, Interpersonal, and Mastery learners.

In a Role Playing activity, students assume the identities of others and act out their roles in a scenario. In acting out a scenario, they are not only helping the rest of the class learn, but also themselves. Role-playing a scenario results in improved understanding of the topic material for those presenting the scenario, because it pushes them to level four of learning (I can teach this to others).
Combining Strategies

By combining two teaching strategies, you are often better able to address all the learners in your class. The grid below shows how Circle and Role Playing can be combined to address all four of the learning styles.

<table>
<thead>
<tr>
<th>Agenda</th>
<th>Group work to create and present</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>Create a lesson plan</td>
</tr>
</tbody>
</table>

Teaching Tip: Combining Strategies
Use Compare and Contrast after a Jigsaw to address the needs of Mastery learners.

Compare & Contrast

Compare & Contrast by itself can target all four types of learners, but is focused on Understanding learners.

*   *   
X   *

If you only teach with Compare & Contrast, you will slightly address all learning styles, but you will only directly address the Understanding learners.

The Compare and Contrast strategy begins with the solicitation of ideas from your learners, and ends with a discussion. The phase in between these – comparing and contrasting with the help of a visual organizer – is essential because it addresses the Mastery learning style. It is important to note the last phase of this teaching strategy: discussion. During this discussion phase, the trainer still maintains the role of the facilitator and can still do a lot of new teaching, but discussions are stimulated by and originate from the learners now, rather than the trainer. This makes the learners feel more empowered in the classroom.
Preview of the New American Lecture

The New American Lecture is the most important and useful teaching strategy that you will learn in this class. In fact, it is so important, that it is addressed in detail in the following chapter.

Below is the table describing the general points of the New American Lecture teaching strategy, to provide you with a preview of the upcoming topic. Note that this is the only learning style to fully address targets the needs of all four learning styles, through lecture even!

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<table>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

Lecture is a teaching strategy that has been used for a long time. However, traditional lecture, where the trainer actively shares information and the learners passively listen, is an easy trap to fall into as a trainer because it’s easy to prepare. The trainer knows the material and can share the information to the class quickly, but only about 25-50% of your learners will pick it up.

Traditional lecture (or Direct Instruction without the use of supplemental teaching tools) only targets Mastery and Understanding learners at best. The New American Lecture takes that approach and incorporates other tools/techniques to ensure all learning styles are equally addressed.

A New American Lecture requires the use of a hook, a visual organizer, and effective questioning techniques by the trainer. In addition to those 3 major components, a number of teaching tools can be used to make it even more successful and easier for all learners to understand.

**Pause DVD**

Pause the DVD and ask your learners if they would like to review any of the As You Watch answers in chapters 1-3.

**Start DVD**

Start the DVD after you’ve gone over the As You Watch answers from chapters 1-3.
TURN TO CHAPTER 4
Reviewing the Lesson

A number of effective teaching strategies exist for a trainer to use.

- Which teaching strategy you choose should depend on multiple factors, including the learning styles and the abilities of your learners, as well as the content to be taught.

Your teaching strategies should be varied enough to accommodate all four learning styles and multiple intelligences. You can vary your teaching strategies by:

- Changing them every 20-30 minutes.
- Using supplemental techniques to target learners that the main strategy doesn’t address when used exclusively.

Apply Your Knowledge

1. Name four elements you should consider before choosing a teaching strategy:

   (ANY OF THESE WILL WORK)

   - OBJECTIVES, GOALS, AVAILABLE STRATEGIES, STORY,
   - LEARNING STYLE, SUPPLEMENTAL STRATEGIES, TOPIC PRIOR TO/AFTER, EXPERIENCE

2. Which is the **most important** element to consider when choosing a teaching strategy?

   THE LEARNING STYLES OF YOUR TRAINEES

3. Which learning styles does the Jigsaw strategy address? What about the Etch-a-Sketch teaching tool?

   JISGAW ADDRESSES INTERPERSONAL AND UNDERSTANDING LEARNERS
   ETCH-A-SKETCH ADDRESSES MASTERY, INTERPERSONAL AND SELF-EXPRESSIVE LEARNERS
4. What should you do as a trainer if you choose a teaching strategy that doesn’t address every learning style?

SUPPLEMENT THE STRATEGY WITH AN ADDITIONAL TEACHING STRATEGY OR TEACHING TOOL
Chapter 4
New American Lecture

The New American Lecture 2
Hook 2
Visual Organizer 3
Effective Questioning Techniques 4
   Expert Questions 4
   Good Leading Questions 5
Review Questions 5
Assessment Questions 5
Active Learning Questions 6
Fill-in-the-Blanks 6
Directional Statement 6
Responding to Learners’ Answers 7

Reviewing the Lesson 8
   Apply Your Knowledge 8
The New American Lecture

As we mentioned at the end of the previous chapter, the New American Lecture is the most important and useful teaching strategy that you will learn in this class. You’ve already learned about a number of teaching strategies you can incorporate into your classroom, and that varying your strategies helps engage all learning styles. In this lesson, you’ll learn what the essential pieces to the New American Lecture are and how to use it effectively in your classroom.

In A Nutshell…

The New American Lecture is a way to reach learners of all four learning styles with one teaching strategy. The trainer presents information using a hook, a visual organizer, and effective questioning techniques to grab learners’ attention, help them see what the topic is, and deepen their understanding through questions. Because it incorporates all of the techniques and theories you’ve learned about so far, it’s an excellent strategy to employ when your class time is limited.

Hook

Recall the four learning styles and their likes and dislikes:

- Understanding learners learn best from projects of personal interest.
- Self-Expressive learners like the opportunity to plan and pursue their own interests.
- Interpersonal learners like studying about things that directly affect people’s lives rather than impersonal facts or theories.
- Mastery learners prefer to learn by knowing why a task must be done.

As You Watch…

What is the number one way to hook learners?

BY ELICITING, TARGETING, AND CHECKING OF THEIR GOALS.

The hook grabs the attention and interest of all learners by addressing two fundamental components to adult learning:

- They know why they need to learn something.
- They can learn through experience.
As You Watch…
What should your hook immediately address?

HOW ADULTS LEARN

Every topic that you teach needs to have some kind of hook - something to grab the learners. It can’t just be an initial hook either. The trainer needs to constantly “remind” the learners that they should be paying attention because what you are about to say or show is really important to them, not just important to the trainer. So, what is it that learners really want to know? When is it that they will truly feel that they know why they are learning something. Answer: When the trainer refers back to the goals of the learner.

Teaching Tip: Goals & Stickies
When you elicited learner’s goals, you should have written them on a large sticky note. Now as you address these goals, check them off. This shows the learners that you are meeting their needs, and you are hooking them into the lesson again.

Visual Organizer

The visual organizer is the second critical piece to the New American Lecture. Like the hook, the visual organizer is something that all learning styles need to maximize their learning. Regardless of which of the four learning styles an adult is strongest in, every adult has one thing in common: they need a visual context to store information – a way to organize all of his or her thoughts that are constantly getting bombarded with new information. This can take the forms of many things, but one thing is true, to be most effective, it should be seen and used by both the trainer and the learner.

As You Watch…
The visual organizer is often the BIG PICTURE.

The trainer has several options at his/her disposal. The most common are listed below:

- The Sticky
  
  This method is fantastic to use as a visual organizer, because it can stay up throughout class. This allows the trainer to refer back to it
throughout training and review sessions. It also allows the learners to use the visual organizer later while they are still learning - to help the concept “sink in” whenever they find the time. Finally, it avoids situations where the trainer erases the board or turns off the power point, only to find that the learners weren’t finished copying things down.

- The Board
- Power Points

**Effective Questioning Techniques**

Who’s the hardest working member of the class? Don’t let your class be passive. Use questions and activities to make sure they’re working as hard as you are.

Through the use of appropriate questions, you can turn a class of passive learners into an actively learning class. Questions not only actively engage your learners, but can also be used to assess how much they are learning.

There are a variety of different kinds of questions that you can ask your learners. They all have one common goal: to keep the learners active and engaged. If you employ the following questioning techniques in your classroom, you will have taught via the New American Lecture, and you will have targeted all four learning styles.

**Teaching Tip: The 7/20 Rule & Effective Questioning**

Remember the 7/20 Rule:

- Every 7 minutes the trainer should change what he is doing
- Every 20 minutes the learners should change what they are doing

Don’t over- or under use questioning techniques on your learners. You can apply the 7/20 Rule to effective questioning by changing your questioning technique every 7 minutes.

**Expert Questions**

What steps would you take to insert a peripheral IV?

- Ask these of the experts in class to keep them engaged
- Build rapport by sharing control
- Only ask if you already know the answer
Good Leading Questions

*How might you add a report button to this screen?*

- Lead the learners to the correct answer
- Virtually impossible for the learners to answer incorrectly

As You Watch…

Should leading questions be planned or spontaneous?

PLANNED, OR YOU MIGHT END UP WITH BAD ONES

AVOID: Bad Leading Questions

*What do you think a resenter is?*

- Likely to be answered incorrectly by the learners
- Can cost you some of your credibility
- Don’t tell them their answer is wrong
  - Ignore it (not ideal)
  - Reword to recover: *I’m sorry that’s a bad question*...

Review Questions

*Which learning style prefers to read, debate, and discuss?*

- Learners are still learning
- Ask these questions to solidify learning
- Use as a segue to introduce a new topic

Assessment Questions

*We’re live now, can you show me how to place an order?*

- Learning is complete
- Ask these to see if learners “got it”
- Ask at the end of class or later
**As You Watch...**

Assessment and review questions may be the same, but

THEY ARE ASKED AT DIFFERENT TIMES

in the learning process.

---

**Active Learning Questions**

Is it true that if I ask you a question, you are likely to be engaged in the discussion?

- Are specific to the New American Lecture
- Keep the learners from zoning out
- Are typically yes/no questions

---

**As You Watch...**

When is the best time to use active learning questions?

BEFORE LUNCH OR IN THE LATE AFTERNOON

---

**Fill-in-the-Blanks**

All I am trying to do with this questioning technique is keep you _______.  
(active/engaged)

- Keep learners active and engaged
- Make sure to use them well – learners need to be able to fill in the blank

---

**Directional Statement**

Write this down. Take a look at your screen.

- Direct learners to do something
- Are specific
- Maintain learners’ focus
**Responding to Learners’ Answers**

If a learner answers a **review question** incorrectly, you must correct him or her, since the learner should *already know* the information. This is a learning opportunity for the learner; be sure to encourage rather than put him or her down.

If a learner answers a **leading question** incorrectly, *do not* correct the learner, since he or she is not expected to know the information. Instead, attempt to either passively ignore the incorrect answer and state the correct answer, or redirect your learners with an alternative question.

---

**PAUSE DVD**

Pause the DVD because chapter 5 begins with an activity.

---

**TURN TO CHAPTER 5**
Reviewing the Lesson

There are three parts to the New American Lecture:

- Hook
- Visual organizers
- Questioning techniques

Apply Your Knowledge

Fill in the names of the **3 main components** of the New American Lecture.

1. The **HOOK** is the information that grabs learners’ interest and attention. Every learning style needs one.

2. **VISUAL ORGANIZERS** help learners by giving them a visual context to identify, organize, and store the new topics you present. Regardless of the type, it is best to involve learners in creating it or writing on it so that they establish a connection between it and what they are learning.

3. **EFFECTIVE QUESTIONING TECHNIQUES** keep learners actively involved, helping them reach the understanding stage of learning. These also help learners to better process and remember information.

Look at each of the questions below and determine whether they are good or bad questions. Explain why. (You do not need to actually answer the questions.)

1. Take a look at the Account Maintenance activity. What do you think the Transaction Inquiry tab is used for?

2. Log in as a nurse and find (but do not open) your patient on your My List.

3. Do you notice any difference in the toolbars for Dr. Pat Mineral and the charge nurse?
# Chapter 5

## Rapport

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- Activity: Successful Encouragement 4
- Activity: Encouragement & Cognitive Dissonance 5
- Activity: Successful Praise 6
- Praise 8
- Encouragement 8
- One-Sentence Intervention 9

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  - Address Learners’ Goals 13
  - Use a Parking Lot 14
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- Share Control 14
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- Show That You Care 15
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Praise vs. Encouragement

Chapter 5 begins with an activity that introduces praise, encouragement and cognitive dissonance before Jason addresses these topics in the DVD.

To start this chapter, you will be doing four mini activities that introduce praise, encouragement and cognitive dissonance. You and your partner will read a short scenario, and then role play the parts of a trainer and a learner by reading the scripted dialogue in your workbook. Before going on to the next activity, answer the questions that correspond with the scenario.

I’ll give you 20 minutes for this activity. Go ahead.

Praise and encouragement are important ways to establish and maintain rapport with your learners, but only when used correctly. In order to understand how praise and encouragement work, or fail, in the classroom, it is best for you to experience them firsthand.

Find a partner and read the training scenario, and role-play the dialogs with your partner and reflect on their outcomes. Take turns being the learner and the trainer.

Activity: Praise & Cognitive Dissonance

You are a trainer in an Epic physician end-user training, and your learners are working on some hands-on exercises individually. Their assignment is to follow all the steps in their training companion, show you when they are finished, and then move on to the advanced exercises. One of the learners, who has been very quiet throughout the class, finishes his basic exercises. He doesn’t raise his hand, but as you are walking around, you notice that he completed the exercise as the companion specified.

Trainer: “Great job, you completed your hands-on and it works. Congratulations!”

Learner: “Great job? I followed all of the instructions, but I have NO IDEA what I am doing. The only reason it ‘worked’ is because I did what you said to do, but I don’t why, and I certainly don’t know how this fits into my job. Why do we have to do this? I prefer paper…this class is worthless.”

1. Reflect: Why did this happen?
2. The trainer used praise in the scenario above. Based on this, define praise:

3. The reaction of this learner exemplifies cognitive dissonance. Based on this reaction, how would you define cognitive dissonance?

Activity: Successful Encouragement

You are a trainer in an Epic physician end-user training, and your learners are working on some hands-on exercises individually. Their assignment is to follow all the steps in their training companion, show you when they are finished, and then move on to the advanced exercises. One of the learners, who has been very quiet throughout the class, finishes his basic exercises. He doesn’t raise his hand, but as you are walking around, you notice that he completed the exercise as the companion specified.

**Trainer:** “I noticed you completed your hands-on, and it works.”

**Learner:** “Yeah, but I don’t know what I did to get here, I just followed the steps.”

**Trainer:** “We have some extra time, would you like to me to review part of the exercise with you?”

1. Reflect: Why did this turn out well?
2. The trainer used encouragement in the third line of the above scenario. Based on this, define encouragement:

3. When the instructor said “I noticed you completed your hands-on, and it works,” this is called a one-sentence intervention. How would you define this concept?

**Activity: Encouragement & Cognitive Dissonance**

You are a trainer for an Epic end-user training session. After each learner has finished the course, they complete a competency assessment prior to go live, in which they work on the system and demonstrate a certain level of mastery. Each learner is required to score at least an 85%, or they must redo the competency after a period of individual tutoring or training. The trainer graded the assessment and the learner scored an 86%.

**Trainer:** “You scored an 86% on your competency assessment. Don’t worry - I’ll help you find the answers to the questions you missed.”

**Learner:** “86%?! – What do you mean ‘don’t worry’? I thought that was a good score.”

1. The trainer used encouragement in the above scenario. Why did this use of encouragement fail?

2. Based on the above scenario, refine your definition of encouragement:
3. The reaction of this learner exemplifies cognitive dissonance. Based on this reaction, refine your definition of cognitive dissonance:

Activity: Successful Praise

You are a trainer for an Epic end-user training session. After each learner has finished the course, they complete a competency assessment prior to go live, in which they work on the system and demonstrate a certain level of mastery. Each learner is required to score at least an 85%, or they must redo the competency after a period of individual tutoring or training. The trainer graded the assessment and the learner scored an 86%.

**Trainer:** “You scored an 86% on your competency assessment.”

**Learner:** “That’s great, I am so happy I passed.”

**Trainer:** “Nice job.”

1. The trainer used praise (in the third line). Why did this use of praise work?

2. Based on the above scenario, refine your definition of praise:

3. The trainer used a one-sentence intervention in the above scenario. Based on this, refine your definition of the one-sentence intervention:
As You Watch…

What is cognitive dissonance?

THE TRAINER SAYS SOMETHING TO THE LEARNER THAT DOES NOT CORRESPOND WITH HOW THE LEARNER FEELS

As You Watch…

Cognitive dissonance is an instant RAPPORT-KILLER.

START DVD

Start the DVD after the class has completed the activity. (You do not need to go over their answers for the activity; Jason covers this in the DVD.)
In A Nutshell…

Praise and encouragement are each very powerful techniques if they are used in the appropriate circumstances.

Praise only works when the learner believes that the praise is accurate and sincere. It can be interpreted by the learner as patronizing or manipulative, even if this is not the intention. Similarly, encouragement only works when the learner wants to be encouraged. Misplaced encouragement can make a learner feel as though they did not measure up, even though they were initially pleased with their efforts.

Cognitive dissonance occurs when there is a difference between the intentions of the person giving praise or encouragement and the perceptions of the person receiving it; this can damage rapport.

Praise

There is a real problem with praise. On the surface, it sounds great, but in actuality praise can cause resentment if it is not used appropriately. Why? It is because of the hidden or covert messages that are implied in praise.

- Praise, by definition is evaluative; it implies judgment.
- Praise implies that the person giving it is in a position to do so.
- Praise implies that the evaluation or judgment is appreciated by the party on the receiving end.

When most of us praise, we are really indirectly expressing our satisfaction with their accomplishment. We are simply hoping the other person will pick up on this as we give our evaluation. But what if they don’t?

Does this mean praise never works? No. Praise can work, if it is done in the appropriate circumstances.

Teaching Tip: Praise

- Be careful not to praise someone that doesn’t feel they deserve it, or you may instantly lose rapport.

Encouragement

Encouragement, on the other hand, is the technique of choice to use with learners who have low self-concepts. Encouragement works very well with resistant learners or learners that are feeling very down on themselves. Encouragement
only works if the learner wants to or needs to be encouraged. If he doesn’t, cognitive dissonance can occur.

Choosing Praise or Encouragement

<table>
<thead>
<tr>
<th>Praise</th>
<th>Encouragement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is general:</td>
<td>Is specific:</td>
</tr>
<tr>
<td>You’re a great student.</td>
<td>“You have 8 out of 10 correct.”</td>
</tr>
<tr>
<td>Places value on the quality of the performance or product:</td>
<td>Emphasizes and values effort:</td>
</tr>
<tr>
<td>I really like that SmartText.</td>
<td>I bet you worked hard on this one.</td>
</tr>
<tr>
<td>Emphasizes the feelings of the person giving the praise:</td>
<td>Emphasizes the feelings of the learners:</td>
</tr>
<tr>
<td>I am so happy with how you all are picking up this material.</td>
<td>Wow! Five out of five, I bet that feels great!</td>
</tr>
<tr>
<td>Is often manipulative. However, this depends on the intentions of the person giving praise AND how it is perceived by the recipient.</td>
<td>Avoids manipulation, since the learner does most of the judging.</td>
</tr>
<tr>
<td>Works only when the learner believes the praise is accurate and sincere.</td>
<td>The technique of choice when working with learners with low self-concepts.</td>
</tr>
<tr>
<td>Can create cognitive dissonance in learners with low self-concepts.</td>
<td>Reduces the chances of cognitive dissonance occurring.</td>
</tr>
</tbody>
</table>

One-Sentence Intervention

In A Nutshell…

The “One-Sentence Intervention” has two very powerful functions:

- It will help you determine whether to praise or encourage.
- It will help you win over very difficult learners.

The “One-Sentence Intervention” is by far the quickest and most effective technique to deal with most challenging learners. It is successful because it helps learners satisfy basic needs for inclusion, affection, and recognition.
As You Watch…

What is the one-sentence intervention?

A NEUTRAL STATEMENT THAT NEVER GIVES A VALUE JUDGEMENT; OFTEN BEGINS WITH “I NOTICED”

In practice, it is very simple; just make a statement that begins with: “I’ve noticed…” The key is to not impose any value judgment whatsoever. This method will allow you to find out what the learner thinks about the situation, and then you can decide whether it is more important to praise, encourage, or leave well enough alone. Notice what the three potential responses to this neutral statement are.

1. Felt good about how they did – it’s time to praise.
2. Felt disappointed by how they did – it’s time to encourage.
3. Felt neutral, or didn’t say how they felt – up to the trainer to explore further or leave well enough alone.

The key difference now though, is that you’ve allowed the learner to determine how he feels about this, without imposing your feelings on the situation.

Teaching Tip: Three Things to Achieved by Lunch on Day One

- **Your learners’ individual goals have been met (or at least have been addressed).** A good way keeping track of this is to create a seating chart. Along with their names, fill in each learner’s individual goal as he or she gives it to you. Check off goals as you address them during the course of your training.

- **Rapport has been built between you and the learners.** One of the easiest ways to do this with a new group of learners is through humor.

- **Your credibility as a trainer has been established.** Be direct with your learners about your knowledge and experience.
Revisiting Rapport

In A Nutshell…

You have already learned about some techniques for building rapport with learners at the beginning of class. But, building rapport doesn’t stop after the first 15 minutes of class. Reaffirming the positive relationship you developed with your learners, or establishing one with a more challenging learner, is crucial to successful training. You will need to constantly build and maintain rapport throughout the class, particularly with some of those more challenging learners.

PAUSE DVD

Pause the DVD when the activity instructions appear and begin the activity (Rapport Refresher).

Now the class is going to do an activity similar to the one in Chapter 1 (using the Circle of Knowledge strategy). This time they will be brainstorming ways to create rapport in the classroom.

*For this activity, you’ll again form groups of four because we’re going to use the same Circle of Knowledge strategy that you did in chapter 1. In your groups, assign yourselves the roles of Facilitator, Time Keeper, Writer, and Relayer. This time, however, you’ll be brainstorming how to build rapport in the classroom as a trainer. We’ll make a list of your ideas after you brainstorm with your group.*

*I’ll give you 5 to 10 minutes. Go ahead.*
Activity: Rapport Refresher

Using the Circle of Knowledge teaching strategy, get into groups of four and take a few minutes to come up with different ways to build rapport in the classroom. Afterwards, make note of what is suggested in the DVD as well. Make sure to assign each person in the group one of the following roles:

**Facilitator** – keeps all group members involved and generates discussion.

**Writer** – documents the important points from discussion.

**Timekeeper** – keeps the group discussion from exceeding the allotted time.

**Relayer** – share the group’s information with the class.

**Group Notes:**

____________________________________________________________________________________________________

____________________________________________________________________________________________________

____________________________________________________________________________________________________

____________________________________________________________________________________________________

____________________________________________________________________________________________________

____________________________________________________________________________________________________

After 5 or 10 minutes, ask the relayers to share what their group came up with. Write their ideas on a big sticky or the whiteboard.

**START DVD**

Start the DVD after you’ve written down their ideas to build rapport.
As You Watch…

Recall the Circle of Knowledge activity you completed earlier in this chapter. Your group generated a list of rapport-building techniques that you have learned so far.

As Jason reviews the activity in the DVD, take notes on additional techniques you may have missed.

**DVD Notes:**

- FUN THINGS & HUMOR
- ICE BREAKERS
- SHARE STORIES
- FIND COMMON ACQUAINTANCES
- USE FIRST NAMES
- OFFER CHOICES – SHARE CONTROL
- REFER BACK TO GOALS - MEET THEIR NEEDS
- ASK FOR FEEDBACK
- ASK HOW THEY ARE DOING – SHOW THAT YOU CARE
- RESTAURANT RECOMMENDATIONS – FOOD
- ENVIRONMENT

**Satisfy Learner Needs**

The workflow and personal goals you elicited from your learners at the beginning of class are only one form of their needs. Be aware of the environmental factors that can affect their learning experience, such as temperature, noise, lighting, seating arrangements, and class size can all affect learners’ physical comfort in class, which can either positively influence or be a detriment to their learning processes.

**Address Learners’ Goals**

Describe how the topics you cover, as you get to them, relate to the goals established by your learners, and show this by checking off their workflow goals on the sticky note from the beginning of class. Doing these things throughout class demonstrates that you are aware of and constantly working to meet your learners’ individual needs and wants.
Use a Parking Lot

Creating a ‘parking lot’ for questions and topics that you can’t address in class is a way to acknowledge your learners’ contributions without losing the direction of the class. Learners may interject frustrations, ideas, or questions that you are not able to answer or deal with in a manner that would satisfy them. If you put the item in the parking lot, your learners will feel listened to and that their needs are or will soon be met. Simply creating a parking lot is not enough; to maintain your rapport with the class you must follow-up on the items.

Teaching Tip: Parking Lot

Introduce the idea of the Parking Lot to your class before you begin teaching any content. Set aside a large sticky note or portion of a board to use for this purpose. Make sure the issues in the parking lot are not lost between classes if the course you are teaching is more than one day long.

If you are able to address or follow-up on an issue, check it off so that the learners can see you haven’t forgotten about it.

Use the One-Sentence Intervention

Determine whether to praise, encourage, or neither. If you use it in this way, it is unlikely that you will misunderstand the feelings of your learners. Correctly assessing the sentiments of your learners will go a long way to maintaining the rapport you have worked to so hard to establish. The one-sentence intervention can also help you win over some types of challenging learners.

Share Control

Offer choices about activities and breaks, and even class direction (jumping around in topics a little) when possible. Sharing this control helps keep more challenging learners engaged, as well as shows that you respect your learners and acknowledge that they are adults capable of making decisions about their lives.

Teaching Tip: Giving the Right Choices

Don’t give your learners choices if you aren’t willing to accept each of the options.

Don’t ask: “Do you want to learn how to order meds for a patient?” unless you are really okay with them replying “no.”

Instead ask: “Would you like to take a break now or in 15 minutes, after we go over how to order meds?”
Recognize Expertise

Use what you’ve learned about effective questioning to elicit participation from your class experts; ask them questions that require their professional opinion. In many cases your learners will know more about a particular topic than you will. Asking them questions that require their professional opinion makes them feel valuable to the class, allows them to show off what they have learned (in a non-disruptive way), and shows that you respect their particular skills and knowledge, just as you want them to acknowledge and respect your experience in your field of expertise.

Before you ask for professional opinions, make sure you know the answers to the questions you are asking. Although recognizing expertise is a way to share control of the classroom, ultimately you should be in control the entire time and the learners will just feel as though they have control.

Show That You Care

Learners want to know that you recognize they are individuals with unique wants and needs, not just one of twenty people in a classroom. They also want to see that you are a person too.

Be a good listener - wait until someone is completely finished talking before you respond. Make eye contact and use ‘open’ body language. Avoid doing other work or prepping during breaks; instead use this time to get to know your learners and interact on a more personal level.

Teaching Tip: Break Times

It’s tempting to use breaks as a way to catch up on other work. Avoid the temptation – break times are a good time to continue establishing rapport with learners. If you (or they) are too busy checking email, you’ll miss a valuable opportunity. Use this time to ask questions and get to know them.

Be Welcoming

Start off class with introductions. Use handshakes, smiles, and other inviting body language so that people know you are enthusiastic about being in this class with them.

Learn & Use Names

Learning someone’s name helps them feel valued and gets their attention. Use name tents or your seating chart to help you remember all of your learners’ names. The act of using someone’s name will also help you to remember it later.
on – try to use names when asking questions, responding to comments or referring to the learner’s goals from the beginning of class.

---

**Teaching Tip: Learning Names Quickly**

To learn someone’s name quickly, try and use it three times in one sentence. Start this process as soon as a learner walks in the door and you greet them with a smile.

---

**Share Stories**

Often learners don’t think of a trainer as a real person. Tell anecdotes to help learners relate to you. When possible, make it a funny story related to the topic you are teaching. This incorporates another rapport-building technique as well as keeps the lesson on track. Sharing appropriate stories in moderation will help learners see you as personable and down to earth.

**Use Humor**

Incorporate humor devices such as media clips, cartoons, or even a joke; all of these help to lighten the mood and give learners’ minds a chance to relax. Consider interspersing something humorous related to the current lesson topic to keep from digressing too much. Note however, that interjecting humor needs to be done at the appropriate times, in moderation, and in appropriate ways.

4 Rules for effective use of humor in the classroom:

1. Don’t use humor until you have built credibility.
2. Use humor to perk the class up when they are tired (late in the afternoon).
3. Use humor to fill pauses in the classroom, while some people are finishing up a task.
4. Know your audience – use jokes stories that are pertinent to the topic and roles you are teaching.

**Food**

Sharing a meal or snack is a fundamentally communal activity. It can foster a sense of community, even in something as brief and routine as a class. Treats bring a smile to almost anyone’s face. They can also ease the physical demands of a long class or one that meets at an early or late hour, by preventing possible distraction of the learners’ attention due to hunger. Easy snacks to have available include candy, cookies, coffee, tea, or water.
Another Teaching Tool

Oral Review

Offer an oral review of class material every 4-6 hours.
  - Oral reviews help the learners know if they “got it.”
  - If they did “get it,” an oral review lets the learners feel successful.
  - Oral reviews let the trainer know if the learners “got it.”
  - Solidify learning on a topic so that the trainer can move on to the next one.

As You Watch…

How many oral reviews should you have?

- 15 minutes = 1 oral review
- ½ day class = 1 oral review
- 1 day class = 1-2 oral reviews
- 2 day class = 2-4 oral reviews

Before asking an oral review question, know the answer and to which part of the lesson your question refers. If learners are unable to answer your question, you can then go back and re-teach or review the topic.

Always end an oral review by asking your learners, “What are your questions?” It assumes people have questions and lets them know it is okay to ask.

How to Conduct an Oral Review

1. Find critical topics (goals and objectives) to review.
2. Know what you want to ask – write it down for yourself if needed.
3. Let the learners know you are going to do an oral review.
4. Tell them not to worry about writing down the answers; they just need to participate in the review.
5. Give the learners a written version of the review, with answers, afterwards.
As You Watch…

Fill out the answers as Jason completes an oral review of the material you have learned so far. Don’t worry about getting every single answer; if you miss them, your facilitator can give you the answers at the end of class.

1. The two main ways how adults learn:
   - PRIOR EXPERIENCE
   - WHY AM I LEARNING THIS

2. If you want to establish the why with adults in your classroom, the very first thing you should do is:
   - ELICIT GOALS

3. What is the teaching tool you can use to get create a big picture when eliciting goals:
   - ETCH A SKETCH

4. What learning styles can an Etch a Sketch address?
   - UNDERSTANDING (BIG PICTURE)
   - MASTERY
   - SELF-EXPRESSIVE

5. What else can you do in the first 15 minutes to grab the class?
   - BUILD RAPPORT
   - HOOK
   - ESTABLISH CREDIBILITY
   - ESTABLISH THE WHY

6. How do we establish credibility?
   - MENTION YOUR EXPERIENCE
   - SHARE CONTROL – ASK FOR THEIR EXPERTISE
   - SPEAK INTELLIGENTLY ABOUT THE INDUSTRY/TOPIC

7. How do we build rapport?
   - USE THEIR NAMES
   - ICEBREAKERS
   - SHARE STORIES
   - ELICIT GOALS
7. What are the 3 types of objectives?
   - **CONCEPTS** - why
     - Describe…, Explain…
   - **ALGORITHMS** – how
     - Steps
   - **CONVENTIONS** - what
     - Define…

8. What is the 90/10 rule?
   - 90% OF BRAIN FOCUSED ON THE LEARNER

9. How do you do that?
   - BY MANAGING YOUR CLASSROOM
   - THROUGH THE NEW AMERICAN LECTURE

10. What are the 3 parts to the New American Lecture?
    - HOOK
    - VISUAL ORGANIZER
    - EFFECTIVE QUESTIONING TECHNIQUES

11. What are the 7 questioning techniques?
    - REVIEW – still learning
    - ASSESSMENT – learning complete, did they get it?
    - EXPERT – share control, build rapport
    - Fill-in-the-BLANK
    - LEADING
      - Good – **LEARNERS WILL KNOW THE ANSWER**
      - Bad – **LEARNERS LIKELY WONT KNOW THE ANSWER**
      - How to recover from asking a bad one?
        - REDIRECT
        - Don’t IGNORE
        - Don’t CORRECT
13. What is the 7/20 rule?
   o Every 7 minutes the TRAINER should change what he is doing
   o Every 20 minutes the LEARNERS should change what they are doing.

14. What is praise?
   o Giving positive feedback, which the learner MAY NOT APPRECIATE

15. If a learner does not feel the praise warranted, that can cause:
   o COGNITIVE DISSONANCE

16. How to avoid praising when you shouldn’t?
   o USE THE ONE-SENTENCE INTERVENTION

17. The One-Sentence Intervention is a NEUTRAL statement to establish how the learner feels.

18. Three responses to the One-Sentence Intervention:
   o PRAISE
   o ENCOURAGE
   o DO NOTHING

19. Encouragement emphasizes the EFFORT of the learner.

20. 3 major ways to build Rapport:
   o SHOWING THAT YOU CARE
   o MEETING THEIR NEEDS
   o SHARING CONTROL

TURN TO CHAPTER 6
Reviewing the Lesson

Praise vs. Encouragement
- Praise: effective only when the learner believes the praise is accurate and sincere, when the learner actually believes he or she deserves praise, and when the learner is receptive to praise.
- Encouragement: effective on those who have low self-concepts.

The One-Sentence Intervention
- Helps you determine whether to praise or encourage.
- Helps you win over most challenging learners.

Apply Your Knowledge

1. Come up with a one-sentence intervention you think would be effective to on a learner who has not been receptive to your teaching strategies.

I NOTICED YOU FINISHED YOUR HANDS-ON EXERCISE.

(ANSWERS WILL VARY)

2. Imagine that you have a learner who’s just not getting it and is frustrated as a result. Write down an encouraging statement.

WHY DON’T WE TAKE 20 MINUTES BEFORE CLASS TOMORROW AND WORK ON THIS PART THAT YOU’RE STRUGGLING WITH?

(ANSWERS WILL VARY)

3. When should you begin building rapport with your learners?

IMMEDIATELY

4. When should you stop worrying about building rapport with your learners?

NEVER
Chapter 6
Challenging Learners

Working Effectively With Challenging Learners 2
Intervention Strategies for “Bad” Behavior 2
Standing in Your Learners’ Shoes 3
How to Handle Slow vs. Fast Learners 6
   Exploratory Activities 6
   Guided Activities 6
   Demonstration 6
   A Trainer’s Prelude to the Pact 7
   The Training Pact 7
   Activity: Three-Step Correction Role-Play 9

Reviewing the Lesson 10
   Apply Your Knowledge 10
Working Effectively With Challenging Learners

In A Nutshell…

To train effectively, you need to view training from the learners’ viewpoint. Understanding how it feels to be a learner allows you to empathize with their needs and concerns and thus better address them. It will also help you work with learners who present you with more resistance or challenges during class.

No matter how great your training is, there will always be a challenging learner in your class. Some of these challenges fit certain patterns. If you understand potential challenges, you can plan how to handle them if they arise and turn the situation around before it gets out of control.

Teaching Tip: Dealing With Negative Attitudes

- Using good communication and consistent messages about how the system benefits them, showing empathy, and addressing your learners’ needs will help eliminate negative attitudes.
- When a negative attitude perseveres, try to understand from where their negative behavior stems. This will help you turn the situation around.

Intervention Strategies for “Bad” Behavior

The information in the table below is based off of Rudolf Dreikurs’s Social Discipline Model, which was developed to try to understand the misbehaviors of pre-adolescents. Although the original research was done with children, much of what he concluded is applicable to students of all ages.

<table>
<thead>
<tr>
<th>Feelings</th>
<th>Likely Goal</th>
<th>Corrective Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annoyance, delight</td>
<td>Attention</td>
<td>No eye contact or words; coax or remind as soon as the trainee starts the annoying behavior; non-verbally make the trainee feel cared about</td>
</tr>
<tr>
<td>Provoked, threatened, challenged</td>
<td>Power</td>
<td>Give choices, not orders; sidestep power struggle; give trainee ways to feel powerful</td>
</tr>
<tr>
<td>Feelings</td>
<td>Likely Goal</td>
<td>Corrective Measure</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Hurt, mad,</td>
<td>Revenge</td>
<td>Do not “hurt” back; reestablish relationship and rapport; use logical consequences</td>
</tr>
<tr>
<td>vengeful</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Despair, pity,</td>
<td>To avoid</td>
<td>Do not coax or show pity; arrange for small successes; avoid “doing” for trainee</td>
</tr>
<tr>
<td>annoyance</td>
<td>discouragement;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>learned helplessness</td>
<td></td>
</tr>
</tbody>
</table>

**Standing in Your Learners’ Shoes**

Some learners may experience:

- **Frustration.** Learners may feel frustrated at having to undergo training, or they may become frustrated if they don’t understand new information immediately.

- **Resistance.** Few people like change. If people are unhappy about being “forced” to accept a change, they may try to find fault with new systems and processes and have a negative attitude during training.

- **Fear.** Many of your learners are worried about how their ability to learn and adapt will affect their jobs. Are they going to be able to learn this new, seemingly complex system? If they have trouble learning it, how will that affect their job standing? This fear can hinder the learning process.

Emphasizing the benefits of the new system, showing empathy for their situation, and communicating well with learners will help them overcome these feelings.

**Teaching Tip: A Three-Step Method for Correcting Behavior**

1. Use the tools you’ve already learned to try to **prevent negative behavior** (rapport, credibility, engaging questions, varied teaching methods, visual organizers).

2. Walk over and **stand by the person**.

3. During the next break, use a **one-sentence intervention** with the person **one-on-one** (e.g., “I noticed you didn’t complete the activity”). From there, praise, encourage, or discuss as appropriate.

If the behavior persists, let them know how their behavior disrupts class and affects others, and that it is not okay.
As You Watch…
Fill in the tables below with effective intervention strategies to use on each type of challenging learner.

<table>
<thead>
<tr>
<th>Talk Hog</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Interrupt presentations with questions/comments at inappropriate times</strong></td>
<td></td>
</tr>
<tr>
<td>1. NO EYE CONTACT OR WORDS</td>
<td></td>
</tr>
<tr>
<td>2. APPROACH THE LEARNER INDIVIDUALLY</td>
<td></td>
</tr>
<tr>
<td>3. MAKE THE LEARNER FEEL CARED ABOUT</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resenter</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Feel like prisoners in the classroom; Emotions prevent constructive learning</strong></td>
<td></td>
</tr>
<tr>
<td>1. DON’T HURT BACK</td>
<td></td>
</tr>
<tr>
<td>2. RE-ESTABLISH THE RELATIONSHIP – RAPPORT</td>
<td></td>
</tr>
<tr>
<td>3. USE LOGICAL CONSEQUENCES</td>
<td></td>
</tr>
<tr>
<td>4. DO NOT USE THE ONE-SENTENCE INTERVENTION</td>
<td></td>
</tr>
<tr>
<td>5. SIDE-STEP POWER STRUGGLES</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Heckler</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Often sits in the back of the room; Can be maliciously vocal</strong></td>
<td></td>
</tr>
<tr>
<td>1. GIVE CHOICES – NOT ORDERS</td>
<td></td>
</tr>
<tr>
<td>2. NO EYE CONTACT OR WORDS</td>
<td></td>
</tr>
<tr>
<td>3. SIDE-STEP POWER STRUGGLES</td>
<td></td>
</tr>
<tr>
<td>4. GIVE LEARNER A WAY TO FEEL POWERFUL</td>
<td></td>
</tr>
<tr>
<td>5. USE ONCE-SENTENCE INTERVENTION</td>
<td></td>
</tr>
</tbody>
</table>
**Griper**

*Likes to find fault; Constantly expresses concerns; Often says “Yeah, but...”*

1. DON’T COAX OR SHOW PITY
2. DON’T DO THINGS FOR THEM
3. USE A PARKING LOT
4. ARRANGE SMALL SUCCESSES
5. TURN IT BACK TO THEM – HOW WOULD YOU HANDLE THIS?
6. ESTABLISH GROUND RULES

**Expert**

*Likes to make his knowledge known; Challenges trainers knowledge/authority*

1. USE EXPERT QUESTIONS TO DRAW ON THEIR KNOWLEDGE
2. TURN THEM INTO ALLIES
3. INVOLVE THEM AS GROUP LEADERS

**Quiet Type**

*Unresponsiveness makes progress hard to assess*

1. ASK DIRECT QUESTIONS
2. GIVE THEM SPECIFIC ROLES IN A GROUP
3. USE HUMOR
4. USE ONE-SENTENCE INTERVENTION
How to Handle Slow vs. Fast Learners

As You Watch…
Fill out the table as Jason explains it in the video.

<table>
<thead>
<tr>
<th>Exploration</th>
<th>Guided Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>• NEW MATERIAL</td>
<td>• MATERIAL THAT HAS ALREADY BEEN MODELED</td>
</tr>
<tr>
<td>• STOP WHEN THE FASTEST LEARNER IS DONE</td>
<td>• STOP WHEN THE SLOWEST LEARNER FINISHES</td>
</tr>
<tr>
<td></td>
<td>• BASIC TASKS AND IF YOU HAVE TIME TASKS TO ACCOMMODATE BOTH FAST AND SLOW LEARNERS</td>
</tr>
</tbody>
</table>

**Exploratory Activities**
- Example: Scavenger Hunt
- Not essential for learners to complete
- Stop when the first person (fast learner) is done with it

**Guided Activities**
- Example: Step-by-step Guided Practice exercise
- Learner must complete the entire activity to achieve the critical objectives for the lesson
- Stop when the last person (slow learner) is done
- Need to have If You Have Time tasks built in to the activity for the fast learners
  - Must be *new* information
  - Not repetition of what they just completed

**Demonstration**
- Example: Lecture (as in New American Lecture) with in-system demonstration
- Learners can follow along *or* just watch the main screen
You will never be able to go at a speed that works for all people, so use the Pact.

**A Trainer's Prelude to the Pact**

Before the first lecture of the first day of class, ask your learners:

- “How many of you like to follow along on the computer?”
- “How many of you like to just watch as I teach?”
- “Is it possible for me, the trainer, to go at a pace that works for everyone?”

Because the answer to the previous question will almost always be “no,” all you need to do is make sure the class is aware that *there is no training speed that will make all of them happy*. Find a speed that works for you and it will facilitate your best training.

**As You Watch…**

Fill out the table as Jason explains it in the video.

<table>
<thead>
<tr>
<th>The Pact</th>
</tr>
</thead>
<tbody>
<tr>
<td>• LECTURE</td>
</tr>
<tr>
<td>• “IS THERE 1 PACE TO PLEASE EVERYONE?”</td>
</tr>
<tr>
<td>• “WHO LIKES TO FOLLOW ALONG?”</td>
</tr>
<tr>
<td>• “WHO LIKES TO JUST WATCH?”</td>
</tr>
<tr>
<td>• “STOP AND WATCH IF YOU ARE LOST, REVIEW EXERCISES LATER”</td>
</tr>
</tbody>
</table>

**The Training Pact**

After the class recognizes that you cannot train/demo at a speed that works for everyone, make an agreement with them:

- “If in trying to follow along with my demonstration, you get lost, you will stop and just watch.”
- “In return I promise to give you a hands-on exercise in your workbook/companion to teach you the same material that I covered in the demonstration.”

You must follow through on the Pact – provide them with review activities at the end of the lesson to cover any material addressed in your lecture and demonstration. Ideally you would have review activities for all teaching strategies, but it is essential for lecture.
Remind your learners of the Pact whenever you see someone getting frustrated by an inability to keep up with a demonstration. Don’t call attention to the person in front of the whole class; instead, talk to them during a break or make a general statement to the entire class.

**As You Watch…**

Fill in the tables below with effective intervention strategies to use on the remaining 2 types of challenging learners.

### Slow Learner

*Asks a lot of questions or none at all; Has a hard time keeping up with exercises*

1. **STAY CLOSE (PROXIMITY) TO THEM**
2. **OFFER EXTRA HELP OUTSIDE OF CLASS**
3. **GIVE ENOUGH TIME TO COMPLETE BASIC TASKS**
4. **FOLLOW THROUGH (AND REMIND THEM OF) THE PACT**

### Fast Learner

*Technically experienced; Finishes early; Looks bored; Asks complex questions*

1. **BUILD IN ADVANCED EXERCISES (IF YOU HAVE TIME TASKS AND INDEPENDENT PRACTICE HANDS-ON)**
2. **GIVE THEM TEACHING OPPORTUNITIES – GROUP WORK AND BUDDY SYSTEM**
3. **CREATE EXPLORATION THAT ARE CHALLENGING ENOUGH SO THAT THEY DO NOT FINISH EARLY**
4. **REWARD THEIR FAST LEARNING, DON’T PENALIZE IT**

**PAUSE DVD**

Pause the DVD and begin the Activity (Three-Step Correction Role-Play).

Tell your trainees to find a partner.

_This last activity is another partner role-play. One of you will act like a challenging learner, and the other one will respond as the trainer. Use the_
three-step correctional technique. Then switch roles (and play a different challenging learner).

I'll give you five to ten minutes to run through this.

**Activity: Three-Step Correction Role-Play**

1. Partner with another learner.
2. Pick one person to play the learner and one of you to be the trainer.
3. If you are the learner, act out one of the challenging learner personas.
4. If you are the trainer, respond to the challenging learner using the three-step correction outlined in the teaching tip.

**START DVD**

Start the DVD after the class finishes the activity. (This is the end of the class, but Jason gives a short conclusion to the course.)

**STOP DVD**

This concludes the DVD. Ask your learners if they need answers to any of the As You Watch segments in chapters 4-6 (including the Oral Review from chapter 5). Ask if there are any lingering questions.

CLASS DISMISSED!
Reviewing the Lesson

- Being diligent about teaching strategies and other techniques you learned – such as building rapport by sharing control – will help prevent many negative situations.
- Empathy with your learners will help you understand how to prevent and correct negative behavior.
- Negative behavior often falls into certain categories which have suggested strategies for dealing with them.
- Memorize the three-step correction, which will help you in most situations.
  1. Use preventative techniques, such as building rapport and credibility, engaging questions, varied teaching techniques, etc.
  2. Increase your physical proximity to the challenging learner by walking over to him.
  3. Use the one-sentence intervention.
- One-sentence interventions work best with challenging learners that are looking for attention; this includes Talk Hogs and Experts, and sometimes Gripers and Hecklers (however, never use it on Resenters). The use of a one-sentence intervention will also help you decide whether to praise or encourage.

Apply Your Knowledge

1. With which type of challenging learner should you not use the one-sentence intervention?
   RESENTER

2. How do you effectively handle a classroom talk hog? A quiet type?
   TALK HOG – NO EYE CONTACT OR WORDS; APPROACH INDIVIDUALLY
   QUIET TYPE – ASK QUESTIONS OF HIM/HER; ASSIGN SPECIFIC ROLES WHEN IN GROUPS
3. What is the Pact?

Making the trainees aware that as the trainer, you cannot go at a speed that works for everyone. They should individually find a speed that works for them.

Notes: Challenging Learners
**Appendix A**

**Training Checklists**

<table>
<thead>
<tr>
<th>Checklist</th>
<th>Page</th>
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<tbody>
<tr>
<td>Pre-Training Checklist</td>
<td>3</td>
</tr>
<tr>
<td>Day-Of Training Checklist</td>
<td>4</td>
</tr>
<tr>
<td>Post-Training Checklist</td>
<td>5</td>
</tr>
</tbody>
</table>
Pre-Training Checklist

So you’ve attended class, and learned all this material ...now what? How do you put into practice what you have learned? Here are some concise steps to becoming an effective trainer.

- Learn your content really well; don’t just learn it to pass your test, learn it to use the 90/10 rule.
- Find out where you will be training
  - Create a seating chart template for that location
- Prep your humor for each class – what and when in the lesson
- In your lesson plan, prepare the:
  - Hook
  - Effective questions and their answers
  - Objectives for the lesson, the goals they fit into
  - Activities
- Prepare an assessment tool that will allow you to determine if your learners “got it” or not.
- Practice and time your lesson plan, with or without an audience, as much as needed to achieve the 90/10 rule
- Provide yourself ample time to revise your lesson plan as needed
- The day before training (or no later than 30 minutes before class starts):
  - Test the projector and all learner computer stations
  - Handouts/companions at each worksheet
  - Sign in sheet ready to be used
  - Write a welcome note, your name and smiley face on the board
  - Make sure you have 5 large sticky notes for every day of class
  - Make sure you have adequate whiteboard space and markers
  - Make sure you know where the restrooms are located
  - Make sure you know the lunch/break schedule
Day-Of Training Checklist

So you’ve attended class, and learned all this material ...now what? How do you put into practice what you have learned? Here are some concise steps to becoming an effective trainer.

- Be in class at least 30 minutes before start time; this time should be set aside for greeting and talking with learners as they enter your classroom.
- Turn all computers on.
- Have readily accessible your:
  - Seating chart
  - Syllabus
  - Handouts
  - Lesson plan script
- Fill out seating chart after you greet each learner.
- Introduce yourself (name and credentials) to establish credibility
- Begin with an icebreaker (write these on the seating chart as you go):
  - Name & Role
  - Personal goals (not related to workflows)
  - Sharing (ex: what is your favorite childhood toy?)
- Start building rapport immediately by:
  - Using humor
  - Memorizing names (attempt to do so by noon)
  - Offering your learners choices
  - Asking expert questions
- Elicit workflow goals from the class as a whole; write these on sticky note.
- As you address objectives, connect them to the workflow goals and check those goals off.
- Take out the lesson plan script and begin to teach. It is okay for learners to see you use this, as long as you are teaching effectively.
- Offer breaks every 60-75 minutes; never exceed 75 minutes without a break.
Post-Training Checklist

So you’ve attended class, and learned all this material …now what? You used the pre-training and training checklists, but how do you know if all your efforts paid off? Here are some questions to help you reflect on and evaluate the course.

1. To what extent were the students productively engaged?

2. Did the students learn what I intended?

3. Were my personal instructional objectives met?
   a. How do I know?
   b. If not yet, how and when will I know?

4. Did I alter my lesson plan as I taught the class? If so, why?

5. If I had the opportunity to re-train the same group of students, what would I do differently?

Incorporate the above reflections in a rewrite of your lesson plan. Relearn and practice the updated lesson plans and strategies before your next class.
Appendix B
Learning Styles Assessment

Introduction to the Assessment  2
Choosing Self-Descriptors  3
Scoring  5
Transfer Your Rankings  5
Compute Your Score  6
Analyze Your Learning Preferences  7
Learning Profile  7
Visualize Your Profile  8
Learning Styles Summary  9
Learning Styles in the Classroom  11
Introduction to the Assessment

The aim of this assessment is to describe how you learn, not to evaluate your learning ability or to assign labels.
Choosing Self-Descriptors

In each of the following 25 horizontal sets, rank the four behavioral descriptors in order of preference. Rank the descriptors according to those which best describe how you approach learning.

Use the numerical values below to quantify your preferences:

- First preference = 5
- Second preference = 3
- Third preference = 1
- Fourth preference = 0

Be sure to assign a different weighted number to each of the descriptors in each set; do not make ties. Note that a rank of 0 does not mean a descriptor does not apply to you; only that it is your least preferred of that set. Please answer every item and keep in mind there are no right or wrong answers.

Remember: work *across* each row, comparing the descriptors in each set.

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<th>Descriptor A</th>
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<th>Descriptor B</th>
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Scoring

To compute your learning score for each of the four learning styles, transfer the numbers from your answer sheet (the previous table) to the scoring sheet below. The descriptors within each set are the same, but they may be in a different order, so read carefully.

For example, if for Set 1 you ranked the descriptors like this:

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Then when transferred to the scoring table below, they would look like this:

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<th>Rank ST</th>
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<th>Intuitive-Feeling</th>
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Transfer Your Rankings

Ignore the last row in this table for now. You will use that to compute your scores after all of your rankings have been transferred over.

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## Learning Styles Assessment

### Spring 2008

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<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Experience</td>
<td>Effort</td>
<td>Examination</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Social</td>
<td>Sequential</td>
<td>Scientific</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Compute Your Score

To compute your learning styles scores, simply add the values in each of the four columns in the table you just completed. (Now is when you work **vertically** within the table.)
Analyze Your Learning Preferences

Using the totals you just calculated, refer to the table below to evaluate which learning preferences you have.

**Strengths of Preferences**

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>100-125</td>
<td>very strong choice; very comfortable in the style</td>
</tr>
<tr>
<td>75-99</td>
<td>strong choice; comfortable in the style</td>
</tr>
<tr>
<td>50-74</td>
<td>moderate choice</td>
</tr>
<tr>
<td>25-49</td>
<td>low comfort in the style</td>
</tr>
<tr>
<td>0-24</td>
<td>very low comfort in the style</td>
</tr>
</tbody>
</table>

**Learning Profile**

No one learning style adequately represents the complexity of one’s learning behavior. Everyone operates in a variety of ways in different situations. Depending on how demanding a particular learning challenge may be, one “flexes” or compensates by using other, often less-preferred, styles. It’s important, therefore, to identify not just one’s dominant or most-accessible style, but also one’s entire profile. It is the full profile that gives the only accurate picture of how an individual functions.

One’s profile consists of four styles in a descending order of access. The dominant style is the most accessible because it is the most practiced. The auxiliary style is accessible with some additional effort. The third level (tertiary) and least developed (inferior) are such because they are not routinely practiced and therefore are much less accessible. One’s profile is always a hierarchy, but over time and with increasing consciousness, the tertiary and inferior functions can become more accessible as a result of practice.

Fill out the table below to see what your learning style hierarchy is. List your learning style preferences so that the highest score is at the top, and the lowest score is at the bottom. For Comfort Level, simply list the corresponding adverb from the table at the top of this page (Strengths of Preferences).

<table>
<thead>
<tr>
<th>Score</th>
<th>Style</th>
<th>Comfort Level</th>
<th>Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Dominant</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Auxiliary</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tertiary</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Inferior</td>
</tr>
</tbody>
</table>
Visualize Your Profile

Having completed the scoring of your learning styles and discovering your learning profile hierarchy, plot your profile below. To do this, mark the score you received for each style on the diagonal line (represented with numeric values) in the corresponding quadrant.

Then connect your four marks with a straight line to create a four-sided polygon. This will provide you with a visual presentation of your learning profile.
Learning Styles Summary

Below you will find a detailed description of each of the learning styles, so that you can see how they might apply to you, based on the totals you calculated in the previous sections.

<table>
<thead>
<tr>
<th>The Sensing Thinking (Mastery Learner)</th>
<th>The Sensing Feeling (Interpersonal Learner)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PREFERENCES TO LEARN BY:</strong></td>
<td><strong>PREFERENCES TO LEARN BY:</strong></td>
</tr>
<tr>
<td>- Seeing tangible results</td>
<td>- Studying about things that directly affect people’s lives rather than impersonal facts or theories</td>
</tr>
<tr>
<td>- Practicing what he has learned</td>
<td>- Receiving personal attention and encouragement from his teachers</td>
</tr>
<tr>
<td>- Following directions one step at a time</td>
<td>- Being part of a team – collaborating with other students</td>
</tr>
<tr>
<td>- Being active rather than passive</td>
<td>- Activities that help her learn about herself and how she feels</td>
</tr>
<tr>
<td>- Knowing exactly what is expected of her, how well the task must be done and why</td>
<td></td>
</tr>
<tr>
<td><strong>LEARNS BEST FROM:</strong></td>
<td><strong>LEARNS BEST FROM:</strong></td>
</tr>
<tr>
<td>- Drill</td>
<td>- Group experiences and projects</td>
</tr>
<tr>
<td>- Demonstration</td>
<td>- Loving attention</td>
</tr>
<tr>
<td>- Practice</td>
<td>- Personal expression and personal encounters</td>
</tr>
<tr>
<td>- Hands-on experience</td>
<td>- Sharing personal feelings and experiences with others</td>
</tr>
<tr>
<td><strong>LIKES:</strong></td>
<td><strong>LIKES:</strong></td>
</tr>
<tr>
<td>- Doing things that have immediate, practical use</td>
<td>- Receiving personal attention and encouragement</td>
</tr>
<tr>
<td>- Being acknowledged for thoroughness and detail</td>
<td>- Opportunities to be helpful in class</td>
</tr>
<tr>
<td>- Praise for prompt and complete work</td>
<td>- Personal feedback</td>
</tr>
<tr>
<td>- Immediate feedback (rewards, privileges, etc.)</td>
<td>- Sharing personal feelings and experiences with others</td>
</tr>
<tr>
<td><strong>DISLIKES:</strong></td>
<td><strong>DISLIKES:</strong></td>
</tr>
<tr>
<td>- Completing tasks for which there are no practical uses</td>
<td>- Long periods of working alone silently</td>
</tr>
<tr>
<td>- Activities that require imagination and intuition</td>
<td>- Emphasis on factual detail</td>
</tr>
<tr>
<td>- Activities with complex directions</td>
<td>- Highly competitive games where someone loses</td>
</tr>
<tr>
<td>- Open-ended activities without closure or pay-off</td>
<td>- Detailed and demanding routines</td>
</tr>
<tr>
<td>- Activities that focus on feelings or other intangible results</td>
<td></td>
</tr>
</tbody>
</table>
### The Intuitive Thinking (Understanding Learner)

**PREFERS TO LEARN BY:**
- Studying about ideas and how things are related
- Planning and carrying out a project of his own making and interest
- Arguing or debating a point based on logical analysis
- Problem solving that requires collecting, organizing, and evaluating data

**LEARNS BEST FROM:**
- Lectures
- Reading
- Logical discussions and debates
- Projects of personal interest

**LIKES:**
- Time to plan and organize her work
- Working independently or with other intuitive-thinking types
- Working with ideas and things that challenge him to think, to explore, to master

**DISLIKES:**
- Routing or rote assignments
- Memorization
- Concern for details
- Rigid rules and predetermined procedures

### The Intuitive Feeling (Self Expressive Learner)

**PREFERS TO LEARN BY:**
- Being creative and using his imagination
- Planning and organizing her work in her own creative ways
- Working on a number of things at one time
- Searching for alternative solutions to problems beyond those normally considered
- Discussing real problems and looking for real solutions

**LEARNS BEST FROM:**
- Creative and artistic activities
- Open-ended discussions of personal and social values
- Activities that enlighten and enhance—myths, human achievement, dramas, etc.

**LIKES:**
- Contemplation
- Being able to learn through discovery
- Opportunity to plan and pursue his own interests
- Recognition for personal insights and discoveries

**DISLIKES:**
- Too much attention to detail
- Facts, memorization, rote learning
- Tasks with predetermined correct answers
- Detailed and demanding routines
# Learning Styles in the Classroom

Below are examples of classroom activities based on the different learning styles in your classroom. Fill out examples from your classroom experiences for the intelligences that apply to you.

<table>
<thead>
<tr>
<th>Learning Style</th>
<th>Classroom Activities</th>
<th>Examples from My Classroom</th>
</tr>
</thead>
</table>
| **Mastery** (Sensing Thinking) | Direct instruction, Drill and repetition, Demonstrations, Competitions. | Activities that focus on:  
  * organizing and managing information  
  * practicing a skill  
  * observing  
  * describing  
  * memorizing  
  * categorizing |
| **Likes:** Exercise/Practice |                                                                 |                             |
| **Interpersonal** (Sensing Feeling) | Team games, Learning Circles, Role Playing, Group Investigation, Peer Tutoring, Personal Sharing. | Activities that focus on:  
  * describing feelings  
  * empathizing  
  * responding  
  * valuing |
<table>
<thead>
<tr>
<th>Learning Style</th>
<th>Classroom Activities</th>
<th>Examples from My Classroom</th>
</tr>
</thead>
</table>
| Self-Expressive (Intuitive Feeling) | Divergent Thinking  
Metaphors  
Creative art activities  
Imagining  
Open-ended discussion  
Imagery  
Creative problem solving |
|                                | **Activities that focus on:**  
- hypothesizing  
- synthesizing  
- symbolizing  
- creating  
- metaphorical expression  
- self-expression |
| Understanding (Intuitive Thinking) | Inquiry  
Concept formation  
Debate  
Problem Solving  
Independent Study  
Essays  
Logic problems |
|                                | **Activities that focus on:**  
- classifying  
- analyzing  
- using evidence  
- applying  
- comparing and contrasting  
- evaluating |
Appendix C

Teaching Strategies Table
### Teaching Strategies Table

#### Learning Styles Matrix

- $\textbf{X} =$ emphasized through this strategy
- $\textbf{*} =$ expressed through this strategy

<table>
<thead>
<tr>
<th>Sensing-Thinking (Mastery)</th>
<th>Sensing-Feeling (Interpersonal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intuitive-Thinking (Understanding)</td>
<td>Intuitive-Feeling (Self-Expressive)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Teaching Strategy</th>
<th>Purpose and Description</th>
<th>Learning Styles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circle</td>
<td>Students sit in a circle and are invited to share interpersonal information. The leader then asks circle members to review what they heard, to look for similarities and differences, and then to draw conclusions about what was shared.</td>
<td>![X] ![*]</td>
</tr>
<tr>
<td>Circle of Knowledge</td>
<td>A discussion strategy built around a sparking activity and a focus question. Students kindle responses individually or in small groups, and then participate in a whole-class discussion. In the group version, each member is assigned a role to keep the process on task. The instructor uses a variety of techniques to orchestrate the discussion, maintain focus, and enhance the quality and depth of thought.</td>
<td>![X] ![X] ![*]</td>
</tr>
<tr>
<td>Command</td>
<td>Students are taught a skill or procedure on command, one step at a time, by the teacher. The teacher then checks and corrects after each step, guaranteeing 100% accuracy.</td>
<td>![X]</td>
</tr>
<tr>
<td>Teaching Strategy</td>
<td>Purpose and Description</td>
<td>Learning Styles</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Compare and Contrast</td>
<td>This strategy moves through three phases. The first asks students to describe objects or ideas using specific criteria; the second focuses on discrimination, comparing, and contrasting using a visual organizer; and the third is a discussion phase that focuses on communicating conclusions.</td>
<td>*   *</td>
</tr>
<tr>
<td></td>
<td></td>
<td>X   *</td>
</tr>
<tr>
<td>Concept Attainment</td>
<td>Concepts are taught by providing examples and non-examples of concepts. Students use the examples to identify critical attributes.</td>
<td>X</td>
</tr>
<tr>
<td>Direct Instruction</td>
<td>Teacher models the skill and provides feedback during directed, guided, and independent practice to help students achieve mastery of the skill.</td>
<td>X</td>
</tr>
<tr>
<td>Four-way Reporting and Recording</td>
<td>A strategy that uses jigsaw and a variety of note-taking devices for collecting and sharing information.</td>
<td>*   *</td>
</tr>
<tr>
<td></td>
<td></td>
<td>*   X</td>
</tr>
<tr>
<td>Graduated Difficulty</td>
<td>Students assess their level of competence by choosing from an array of tasks at different levels of difficulty, and then determine the knowledge and skills they need to practice to advance to the next level.</td>
<td>X</td>
</tr>
<tr>
<td>I Teach, You Teach</td>
<td>The class is broken up into threes. One person is assigned as “teacher” from each group. The student teachers meet with the lead teacher, who introduces the new learning to the group while the remaining partners practice previously taught material. The student teachers then return to their groups of three and provide input to the other students. The group is then given a task to assess the group’s mastery of the subject.</td>
<td>X   X</td>
</tr>
<tr>
<td>Teaching Strategy</td>
<td>Purpose and Description</td>
<td>Learning Styles</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Information Search</td>
<td>A reading strategy that begins with a mind map of what students know, establishes questions related to what they want to know, engages them in reading research, and asks them to visually report the new learning.</td>
<td>X *</td>
</tr>
<tr>
<td>Jigsaw</td>
<td>A cooperative learning strategy. Students work in learning teams made up of experts who are responsible for researching subtopics of larger topics. Experts from each learning team meet to discuss their findings, and then return home to their original team to teach their research findings to the group.</td>
<td>X X</td>
</tr>
<tr>
<td>Mastery Review</td>
<td>Students assess their knowledge and skills by reviewing important content. The teacher asks a question and allows students time to respond. The teacher then writes the answer on the board (or tells the students the answer). Students can check their answers immediately or look at the teacher’s answer for coaching or guidance. The teacher then reviews the question and answers and continues the process.</td>
<td>X X X</td>
</tr>
<tr>
<td>New American Lecture</td>
<td>Teacher presents information using a hook, a visual organizer, deep processing, and style questions for processing and maximizing memory.</td>
<td>X X</td>
</tr>
<tr>
<td>Old vs. New</td>
<td>Work through a scenario using an existing model to create a visual organizer. Using that visual organizer to teach that same scenario using a new a new model.</td>
<td>X X</td>
</tr>
<tr>
<td>Proceduralizing</td>
<td>A strategy used to teach the steps in a skill by breaking it down into separate actions and then visualizing and practicing the skill until it becomes automatic.</td>
<td>X X X X</td>
</tr>
<tr>
<td>Teaching Strategy</td>
<td>Purpose and Description</td>
<td>Learning Styles</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Reciprocal Learning</td>
<td>Students work together as peer partners on parallel tasks, one functioning as a “doer”, the other as a “guide”. The guide provides the doer with clues, encouragement, and feedback to ensure a successful outcome.</td>
<td>* X</td>
</tr>
<tr>
<td>Role Playing</td>
<td>Students assume the identities of others and act out their roles in a scenario. They then reflect on how others think about issues and conflicts, resulting in improved understanding and empathy toward the position of others.</td>
<td>* X</td>
</tr>
<tr>
<td>Stations</td>
<td>Break class into small groups and physically move them from station to station. Each station is a different lesson (learning objective) which may use a different teaching strategy than the former station.</td>
<td>X X</td>
</tr>
</tbody>
</table>