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Train the Trainer*By Scott E. Byorum, Nationwide Real Estate Tax Service, Inc.*

“I never teach my pupils; I only attempt to provide the conditions in which they can learn.” – Albert Einstein

Your star employees are masters at the tasks they perform. But that doesn't mean they are good trainers. So often, key senior employees are tasked with training other employees without any guidance on effective skill transfer techniques. Provide them a framework and guidelines for teaching before assuming they can train others.

Financial services are a critical function of the economy and peoples' livelihood. Banks want to tighten up the methods and the manner in which new people are trained in handling consumer funds, so that procedures are followed completely and consistently every time. Provide the following imperatives to anyone who is expected to train someone else in a procedure or skill:

Be Prepared: Go over in your head the entire process that you are about to show someone. Gather the instructions, know what they say and mark anything that needs correction. Lack of preparedness or being unsure can be disorienting to a learner.

Be Assertive: Say exactly what you want done the way you want it done. Do not insert ambiguity into instruction. This sends a signal to the learner that they will be figuring out their own way to do things, which degrades the learning process and can harm the quality of work. If you need to tell another co-worker what you told a learner, then do so.

Set the Tone: Outline the expectations to the learner from the beginning so that they are not blind-sided by some detail that were unprepared for. Give them an idea of the pace they will be building up to and the load they will be handling.

Gauge the Pace: Think of learning as stacking. The teacher needs to stack the skill set, so that a good foundation is in place to stack the next skill. Don't drag the learner through something before they are able to understand it and display at least a basic competency with. Allow time for the knowledge to form and hold.

Be the Model: It is poor form to pine about optimum conditions. Messages of stress, exasperation, or descriptions of optimum conditions can send a message the learner is a nuisance or that the business isn't doing well. It can also disrupt the quality of training in that what they are being shown now isn't as important as some ambiguous ideal future. In addition, exemplify the company's ideals. A trainer is sowing the seeds of trust and competency.

Once the framework is in place for trainers to demonstrably project the conditions conducive to learning, you will want to have them follow a teaching process. Just as tasks in the bank follow a certain process, so too should the teaching of those tasks, so that everyone involved in teaching or learning comes to expect how skills are transferred.

Follow the Instructions: Follow the way the instructions say to do things. If the instructions are wrong, have them changed. If there are no instructions, have the learner write down what you say, with the intent of having the procedure documented as soon as possible.

Provide an Overview: Describe what you will be training a person to do and the purpose and reasoning behind it.

Instruct, Demonstrate, Hand-Off and Reflect: Provide the instruction, demonstrate the process, have the learner do the process. Reflect on the learner's progress. Gradually wean them off of instruction and demonstration while they follow the instructions and you observe. Guide as needed, but with the purpose of getting the learner to follow written instructions and be self-directed. Verbally sum up progress and what was learned.

Let Them Make Mistakes: Realize that true learning comes from making mistakes. It is best to let a learner make mistakes under your observation. Resist the urge to immediately step in. Try and let the learner find their own mistake.

Be Professional: Limit personal conversations. Some small talk to get to know a person is okay and helps people to relax, but provide an example of professionalism. Likewise, limit personal conversations with co-workers to avoid distracting them from work at hand. There will be time to further engage with people if they work out and become comfortable in their position.

There is a lot more involved with teaching a task effectively than just being able to perform a task effectively. The banks that successfully dazzle their customers with superior performance and exceed expectations don't do so on the fly or with a façade. They have a process, and that process has a process...and the teaching of that process has a process.

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