

<b>Client</b>	IDOL Courses
<b>Project</b>	IDOL Academy - ILT Developer
<b>Module</b>	All

## General Information

### Convention

Scene references are in the format “MxSy” where ‘x’ denotes the module number and ‘y’ denotes the scene number.

Notes and annotations included within the script are denoted by [square brackets]. This text is not to be read for the voiceover.

### Assets

Asset details are in the document

“ILT Developer - asset development list”

<https://docs.google.com/spreadsheets/d/1Ltte1w2LLimWuvJDtjrvXuBUsw7FBFD8TeQ-flmRrz8>

Visual storyboard with example scenes and transitions is in the document

“ILT Developer - visual storyboard”

<https://docs.google.com/presentation/d/1SOkvRjzBJJZGQATYa2cSlapasnf6g0E6lrgyQLCikfY>

## Preface

This is the “ILT Developer” course for IDOL Academy. Though the subject of the course is creating instructor-led training, the course itself is designed as elearning.

This document lays out the course design. It captures all of the content, organization, chunking, sequencing and exercises which make up the course. From this document, the eLearning developer will create course assets necessary to implement the elearning modules.

## Design Concept

The course has two streams of narration.

- One stream of narration is an instructor-type character delivering the subject-matter instructional content of this course.
- The second stream of narration is a coach-type character speaking to the learner as though she/he is an instructional designer.

The coach character delivers information about practice activities, and in the process guides the instructional designer to create an example ILT course for the fictional organization Save The Pine Trees.

This is a “follow along” style rather than a “lecture first, practice later” approach. The two streams of narration are interspersed - the instructor character delivers some new content, then the coach character guides the learner in applying the new information to the example course she/he is creating.

Activities for the course are cumulative. Each activity adds information to the example course assets. At the end, the learner has created a shell of the example ILT course and has a final activity to complete the course and get group feedback on the design.

Rather than a simple statement of the activity instructions, the activities are presented as though the coach character is helping the instructional designer character to create an ILT course for Save The Pine Trees.

## Development Concept

The course is developed in a style similar to other lessons in IDOL Academy - as pre-recorded videos (and animations) rather than as true elearning modules.

As mentioned above, the course is designed for delivery by two characters - the coach and the instructor.

Aspects of the course delivered by the two characters are developed in different visual styles to help the learner know when the narration stream switches from one to the other.

- The coaching portions are developed as an animation with the coach character and the instructional designer character in an office setting. The coach speaks to the instructional designer - posing questions for thought, and giving direction about what to add to the example course. Not all animated scenes include the instructional design character - in some cases the coach is talking to the learner as though the learner were the instructional design character.
- The instructing portions are developed in a style that is similar to other lessons in IDOL Academy. They are videos which may include traditional “slides” of information, simple animations (i.e. biteable) and live-person recordings. These are developed in the visual style of IDOL Academy.

Transitions between the instructor and coach portions are consistent with the story - an example coach-to-instructor transition might be for the coach animation to have a computer screen which contains the instructor video. The animation zooms in on the computer screen and the instructor video becomes full screen.

There are several places in the course where the learner needs background or context information. The necessary information is provided in separate documents and linked in the appendices of this document. These external documents will be provided to the learner via the download function of the LMS. All documents are provided for download from the LMS. The LMS page for each lesson includes a link to download the documents.

# Development Notes

## Characters

Tara (middle age female) - Animated character representing the instructional designer (i.e. the learner). Character is in some animated scenes to create interest and connection. Character has no speaking parts.

Coach (middle age female) - Animated character who is coaching the instructional designer.

Instructor (middle age male) - Live person who delivers the instructional content for the course.

## Conventions

Voiceover direction is given in [square brackets]. Emphasis is noted by italics and bold.

## Pronunciation

**ILT** is pronounced as eye-ell-tee

**eLearning** is pronounced as ee-learning

# Module 1 - Introduction

<b>Scene</b>	(M1S1) Introduction
<b>Characters</b>	Coach

<b>Narration</b>	<b>Commentary</b>
<p>[upbeat]  <b>Congratulations</b>, you've been working hard to learn instructional design techniques and have been creating example assets and eLearning projects.</p> <p>Now, the organization where you volunteer, Save The Pine Trees, has asked you to create and deliver a short training for the volunteers who call potential new members.</p> <p>The request came from <b>Sigurd</b> Leopold - the director of Save The Pine Trees. The topic is something called "Upfront Contracts".</p> <p>It doesn't pay anything but you're super excited about the opportunity to do a real project for a real client. You're also a little nervous because you know nothing about creating or delivering instructor-led training.</p> <p><b>Relax</b> - we're going to do this together, and when we're done you'll have a complete course design document.</p>	<p>Coach            Animation            -----  <b>Sigurd</b> is pronounced as sig-er-d</p> <p><i>See Appendix 1 - Save The Pine Trees background information</i></p> <p><i>Concept:            See visual storyboard slide 1-3</i></p>

<b>Scene</b>	(M1S2) Welcome
<b>Characters</b>	Coach

<b>Narration</b>	<b>Commentary</b>
<p>[upbeat] Hey there, thanks for joining me.</p>	<p>Coach            Animation            -----</p>

<p><del>[professional] Today we're going to spend about an hour learning how to create instructor-led training. <i>Naturally</i>, you're going to learn the basic elements of ILT and how it differs from the eLearning you've been developing.</del></p> <p><del>And <i>obviously</i>, you'll get to practice each of those elements, individually and together.</del></p> <p><del><i>Typically</i>, at the end of the session you will be able to create your own instructor-led training.</del></p> <p><del>[upbeat] Are you ready to get started?</del></p>	<p>Specific wording here is important. Deliver as written.</p> <p><i>Concept:</i> See visual storyboard slide 4</p>
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<b>Scene</b>	(M1S3) Overview
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>The goal of this course is to guide you in creating an instructor-led training that you can later use as a template for creating your <i>own</i> course.</p> <p>The course assumes that you are familiar with instructional design practices and have <i>some</i> experience creating eLearning.</p> <p>It makes reference to how instructor-led training is different from eLearning but <i>does not review or revisit</i> the basics of instructional design or training development.</p>	<p>Instructor Presentation w/VO -----</p>
<p>We're going to accomplish this by giving you an example client and example project. You'll have information about the organization, their workforce and their training resources. You'll also have information about the course content like you might get from an SME.</p>	<p>Instructor Presentation w/VO -----  These are the learning</p>

<p>Using this information, we'll help you to:</p> <ul style="list-style-type: none"> <li>• Use your knowledge of eLearning, Blended Learning and Instructor-Led Training to <u>choose</u> the most appropriate delivery method for a course.</li> <li>• <u>Create</u> common course artifacts that are tailored to the needs of instructor-led training, including: learning objectives, practice activities, quality control plan, and testing plan.</li> <li>• <u>Create</u> course artifacts that are unique to instructor-led training, such as: course schedule, facilitator guide and participant guide.</li> </ul>	<p>objectives.</p>
<p>Finally - as you go through this course, be thinking about in-person training that you have attended. Think about what was done well so you can adopt those practices, and reflect on the shortcomings so you can avoid the same mistakes.</p>	<p>Instructor Presentation w/VO -----</p>

## Module 2 - Delivery Methods

<b>Scene</b>	(M2S1) Introduction
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>In this lesson, you are going to learn about three methods to deliver training: eLearning, Blended Learning and instructor-led training.</p> <p>The objective for this lesson is to have you use your knowledge of these delivery methods to recommend the most appropriate method for the example course.</p>	<p>Instructor Presentation w/VO -----</p>
<p>Instructional design involves the process of identifying the performance, skills, knowledge, information and attitude gaps of a targeted audience and creating, selecting or suggesting learning experiences that close this gap, [using] instructional theory and best practices from the field.</p> <p>From: IDOL Courses Academy, “The Instructional Design Process Overview   Part 1”</p>	<p>No audio Presentation -----</p> <p>Display this quote to the learner. The phrase “selecting or suggesting learning experiences” is highlighted.</p> <p>Pause approx 15 seconds for the learner to read</p>
<p>As an Instructional Designer, part of the job when you create a course is to choose how the course will be delivered. There are many ways to deliver training, let’s take a quick look at the three delivery methods that relate to instructor-led training. We’ll see some of the pros and cons of each to help you understand when you might choose one method instead of the others for your course.</p>	<p>Instructor Presentation w/VO -----</p> <p>Visual shows the three strategies to be examined: eLearning, Blended Learning and ILT</p>

<b>Scene</b>	(M2S2) Methods
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
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<p>eLearning is a technology solution that can take many forms. It may also be called online learning, computer-based training (CBT) or web-based training (WBT).</p> <p>eLearning is delivered via a computer or device and there is not a human instructor involved - though eLearning could include pre-recorded videos of a human instructor.</p> <p>Some of the benefits and drawbacks of eLearning include</p> <ul style="list-style-type: none"> <li>• Higher development and infrastructure cost offset by lower per-learner cost.</li> <li>• High degree of learner control over pace and when/where to watch, but a low degree of learner control over depth of content.</li> <li>• High degree of consistency from learner to learner. The same content is delivered in the same way, every time.</li> <li>• eLearning is often preferred by younger professionals. It requires technology skills that may not be present in older workers.</li> </ul> <p>eLearning is best suited for delivering content to large groups of learners who are in multiple locations, who travel frequently, who have different schedules or where there is frequent turnover.</p> <p>It works well for training concepts and knowledge, or for training skills that can be performed on a computer.</p>	<p>Instructor Presentation w/VO -----</p> <p>As many slides as necessary for good visual design</p>
<p>Blended Learning is a combination of eLearning with traditional instructor-led training, or virtual instructor-led training.</p> <p>As you would expect, blended learning has most of the pros and cons of both ILT and eLearning.</p> <ul style="list-style-type: none"> <li>• High up-front costs to develop the eLearning portions. High per-learner costs for in-person portions. Various challenges with ensuring high quality virtual portions.</li> <li>• Schedule can be much more accommodating - the online</li> </ul>	<p>Instructor Presentation w/VO -----</p> <p>As many slides as necessary for good visual design</p>

<p>portions can occur at the learners pace and schedule. The in-person portions can be much shorter and thus easier to schedule.</p> <p>Blended learning is a good choice for training that has a large knowledge component followed by a large hands-on component.</p> <p>This allows people to study the material at their own pace and arrive for the in-person session with a common baseline of knowledge.</p> <p>In-person sessions can be shorter and more focused when everyone in the group is starting with the same level of knowledge on the subject.</p> <p>The key to creating effective blended learning is accurately identifying content and activities that are best suited for online versus in-person delivery. This is the same process that helps select eLearning versus Blended versus ILT to begin with.</p>	
<p>Instructor-Led Training may also be called ILT, traditional training or classroom training.</p> <p>This is a traditional in-person training that we have all attended (and maybe have facilitated).</p> <p>Pros and Cons of this delivery method are:</p> <ul style="list-style-type: none"> <li>● Learners get a personalized experience. Not only can the facilitator answer questions and provide additional help, a good facilitator will adjust the pace and even adjust the content or activities to ensure the maximum learning for each specific group of learners.</li> <li>● Hands-on experience. It is often easier, or less expensive, to have learners practice with actual equipment or perform the skills in an actual context than it is to create an accurate simulation of the equipment/context.</li> <li>● Shared experience. Learners get to work with other people</li> </ul>	<p>Instructor Presentation w/VO -----</p> <p>As many slides as necessary for good visual design</p>

<p>doing the same things. This creates the possibility of peer collaboration, feedback and reinforcement as they learn. It creates opportunities to meet other people who use the same skills and thus can be a resource after the training.</p> <ul style="list-style-type: none"> <li>• Travel expenses can be costly - transportation, lodging, meals not to mention time away from work and family.</li> <li>• One aspect that is often cited as both a pro and a con is the need to physically attend an ILT session. Some people believe the training is more effective because people are away from their office and are less impacted by everyday distractions than if they were sitting at their desk doing online learning. Other people believe that in-person training is more costly for exactly the same reasons - people are not in their office where they can multitask or can be available if necessary.</li> </ul> <p>Traditional instructor-led training is going to be the best choice for situations when special equipment, environments or contexts are involved, where cost of travel is relatively low or where a personalized experience is important.</p>	
<p>Now that you understand the benefits and drawbacks of some different delivery methods you can use this information to choose how your course should be delivered.</p> <p>To do this, you need to consider the course content, the learner population, the organization's culture and the training resources available.</p> <p>When you understand those elements and compare them with the benefits and drawbacks of the delivery methods, you can identify the method that best matches the needs of a particular course at a particular organization.</p>	<p>Instructor Presentation w/VO -----</p>
<p>You have received information about <i>Upfront Contracts</i> from your Save The Pine Trees contact and are preparing for a project kick off meeting with the stakeholders.</p>	<p>Coach Animation -----</p>

<p>Review the documents in the download section of this lesson. There is one to give you information about Upfront Contracts, and another to give you background information about Save The Pine Trees.</p> <p>Based on what you know about the content, learner population and organization, should you recommend: eLearning, Blended learning or instructor-led training?</p> <p>What other questions will you ask at the kickoff meeting? Write down your recommendation and questions, or add them to a “notes” document for the project.</p>	<p><i>See Appendix 1 - Save The Pine Trees background information</i></p> <p><i>See Appendix 2 - Upfront Contracts information</i></p>
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<b>Scene</b>	(M2S3) The Client Factor
<b>Characters</b>	Coach

<b>Narration</b>	<b>Commentary</b>
<p>From what you learned in the previous section, it seems like an eLearning module with a short in-person practice or coaching session would work well for this training.</p> <p>eLearning is great for volunteers who will take training on their own time and must work around many other time commitments. It is also great for a workforce with high turnover - there is no need for new volunteers to wait for a pre-scheduled class, they can take the training online and get started right away.</p> <p>As the instructional designer, you recommended a delivery method that best meets the needs of the organization. However, the client can overrule even the most sound recommendation.</p> <p>In this case, Mr Leopold agrees that your recommendation for eLearning makes sense. However, he insists on the training being</p>	<p>Coach Animation -----</p>

<p>traditional instructor-led. He explains that eLearning is more expensive to develop because they have many volunteers who can deliver an instructor-led training, but you are the only one who can create eLearning. Also they do not have resources for ongoing services to host, maintain and update eLearning.</p>	
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## Module 3 - ILT Design

<b>Scene</b>	(M3S1) Project Kickoff
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>The goal of any training is to improve performance. The goal should be captured in the course design document using plain language to state the rationale for the course and identify the desired outcome. This becomes the mission statement for the instructional designer to follow in creating the training.</p>	<p>Instructor Presentation w/VO -----</p>

<p>You just had the kick off meeting with Save The Pine Trees and learned that the goal for this Upfront Contracts training project is to improve the number of successful recruitment calls by 10% within 3 months after the training is deployed.</p> <p>Except for insisting on ILT, and having virtually no budget, Mr Leopold has given you freedom to create the course. So let's get started...</p> <p>Go ahead and create a new document for the course design. There is a template in the lesson downloads if you would like something to start with.</p> <p>Begin to capture information for your Upfront Contracts course design document. Include the project goal and a statement that the course will</p>	<p>Coach Animation -----</p> <p><i>See Appendix 1 - Save The Pine Trees background information</i></p> <p><i>See Appendix 2 - Upfront Contracts information</i></p> <p><i>IDD template</i> <a href="https://docs.google.com/document/d/1SVRaLX4xEKei0folxi6BpSH6ljdNktvaTcZ4GZW2468/edit">https://docs.google.com/document/d/1SVRaLX4xEKei0folxi6BpSH6ljdNktvaTcZ4GZW2468/edit</a></p>
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<p>be instructor-led.</p> <p>Don't worry about wording or formatting yet, just capture the information.</p>	<p>See m3s1 kickoff.pptx in the Visual Storyboard folder.</p>
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<b>Scene</b>	(M3S2) ILT Design
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>In this lesson, you are going to learn how designing for instructor-led training is different from designing for eLearning.</p> <p>Along the way, you will create a course design document that is tailored to suit instructor-led training. It will include learning objectives, practice activities, quality control plan and testing plan.</p> <p>Though much of the IDOL Academy is focused on eLearning, the core theories, models, practices and processes of Instructional Design apply to all training regardless of the delivery method.</p> <ul style="list-style-type: none"> <li>• Workflow models like ADDIE, SAM and Action Mapping are the same.</li> <li>• The need for, and the methods to do, analysis are the same.</li> <li>• Adult learning theories and well-formed learning objectives are the same.</li> </ul> <p>Instructor-led training design starts to differ from eLearning when we begin thinking about the learner experience and how we will achieve it.</p> <p>Consider the different experience we could achieve for one person learning on an iPad compared to an experience for 25 people in a classroom compared to an experience for 6 people in a workshop.</p> <p>Let's look at three areas where ILT differs from eLearning:</p>	<p>Instructor Presentation w/VO -----</p>

<ul style="list-style-type: none"> <li>• People, Places and Things</li> <li>• Lesson Design</li> <li>• Quality &amp; Consistency</li> </ul>	
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## People, Places & Things

<b>Scene</b>	(M3S3) People, Places & Things
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>The first challenge of designing instructor-led training is to remember that it will be delivered by a live person and delivered to a live group of people. And that the people may have come together only for the purpose of this training.</p> <p>Let's take 60 seconds and list as many things you can think of that are unique to training for in-person groups. Go ahead and write them down, or type them into a document.</p> <p>Some of the things you might have listed are</p> <ul style="list-style-type: none"> <li>• Flow/pace to keep everyone engaged</li> <li>• Schedule / breaks</li> <li>• Group size</li> <li>• Culture - impacts communication and expectations</li> <li>• Quality / consistency</li> <li>• Location and material preparation</li> <li>• Group activities</li> </ul> <p>We'll look at a few of these issues in the coming sections.</p>	<p>Instructor Presentation w/VO -----</p>

<b>Scene</b>	(M3S3.1) Pacing
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<b>Characters</b>	Instructor
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Narration	Commentary
<p>With eLearning it is usually possible for the learner to backup and review information that was not clear. In some cases it is possible to skip over material that the learner has already mastered.</p> <p>Neither of these are practical to do during instructor-led training. To be effective, instructor-led training needs to ensure that all learners have their needs met.</p> <p>This means the training is designed for, and delivered at, a pace that is appropriate for the majority of learners in a given class. AND - that learners who are ahead of or behind that pace are accommodated in some way.</p> <p>The instructional designer can support an effective pace by creating a course schedule with adequate time for each lesson. Figuring out how much time to allow for a lesson may require testing delivery of the lessons (and activities) to see how long they take. A good learner analysis will help the designer anticipate lessons which might need a slower pace or additional time compared to the test runs.</p> <p>Having additional material or activities can help learners who are faster than the schedule. These can be provided in the participant materials - for example the materials might include a journal article on the topic for participants to read or extra practice activities that are not used during the class.</p> <p>For learners who do not grasp the material in the available time, it is important to let them know when and how they can get help with the material. In addition to planning adequate time for each lesson, the designer can build in time so that a session can run a little long without impacting the overall schedule. The designer can also include language in the facilitator guide encouraging the facilitator to offer help</p>	<p>Instructor Presentation w/VO -----</p> <p><i>See Appendix Z - References for links to more information on breaks</i></p> <p>Key points:</p> <ul style="list-style-type: none"> <li>● Designer helps set pace by allowing enough time for lessons <ul style="list-style-type: none"> <li>○ Analysis and testing used to determine how much to allow</li> <li>○ Have extra things for people who are faster than pace</li> <li>○ Tell when &amp; how to get help for people slower than the pace</li> </ul> </li> <li>● Designer helps set pace by building in breaks. <ul style="list-style-type: none"> <li>○ Keeps people fresh and focused</li> <li>○ Allows session to run long</li> <li>○ Allows time for offering help</li> </ul> </li> </ul>

<p>during breaks or after the class.</p> <p>An effective pace also includes building in time for breaks. People need a mental and physical break periodically to help stay focused over the longer term. For both working and studying a common suggestion is to work for 75-90 minutes and take a 10-15 minute break.</p>	
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<b>Scene</b>	(M3S3.2) Group Size
<b>Characters</b>	Instructor

Narration	Commentary
<p>The number of participants in a class impacts every element of the course design - from where the class can be held to the activities that can be used. In some cases, the entire training might be designed for a specific number of participants - for example training of team-based skills might be designed around the size of the team and the responsibilities of each team member.</p>	<p>Instructor Presentation w/VO ----- Key Points:</p> <ul style="list-style-type: none"> <li>● Group size matters</li> <li>● Be intentional about the ideal size</li> </ul>

<b>Scene</b>	(M3S3.3) Hands-On
<b>Characters</b>	Instructor

Narration	Commentary
<p>The “people” aspect is often cited as a big benefit of in-person training. And it is true - meeting other people, networking, hearing other peoples experiences and learning about the subject from different perspectives are all great benefits.</p> <p>However, for many subjects the biggest benefit is practicing with real, physical objects in a real context.</p>	<p>Instructor Presentation w/VO ----- Key Points:</p> <ul style="list-style-type: none"> <li>● Learning should occur in proper context with proper equipment</li> </ul>

<p>Just consider the difference between an eLearning activity such as  “Demonstrate the proper rate for CPR chest compressions by clicking the mouse at a rate of 100-120 beats per minute”</p> <p>And an ILT activity such as  “Demonstrate the proper location, rate and depth of CPR chest compressions on the practice manikin”</p> <p>By the way - that first example is actually from the online portion of a blended CPR class. While it does help people become familiar with the 100-120 beats per minute tempo, it is of little use to the learner because the context and motions are so different from real CPR.</p>	
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<b>Scene</b>	(M3S3.4) Practice
<b>Characters</b>	Coach

<b>Narration</b>	<b>Commentary</b>
<p>Add information to your Upfront Contracts design document about the People, Places and Things, such as:</p> <ul style="list-style-type: none"> <li>• estimate of how long the class should be?</li> <li>• An What is an ideal class size?</li> <li>• What type of location is best?</li> <li>• What props or materials might be used?</li> <li>• What are some ideas for activities you might use?</li> </ul>	<p>Coach  Animation  -----</p>

Lesson Design

<b>Scene</b>	(M3S4) Lesson Design
<b>Characters</b>	Instructor

Narration	Commentary
<p>While many elements of lesson design are common between eLearning and ILT, there are a few elements that have enough differences to warrant a discussion.</p> <p>Let's look at three of them: learning objectives, practice activities and presentations.</p>	<p>Instructor Presentation w/VO -----</p>

<b>Scene</b>	(M3S4.1) Learning Objectives
<b>Characters</b>	Instructor, Coach

Narration	Commentary
<p>Learning objectives are a core part of any training design. They break down the organization's goal into discrete steps of learning necessary to achieve the goal.</p> <p>The learner who meets all of the learning objectives has the knowledge and skills necessary to achieve the goal. This is equally true for instructor-led training and eLearning.</p> <p>The difference between the two methods is in the details. Let's use the ABCD format to see how learning objectives might differ between eLearning and ILT.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Learning Objectives still important</li> <li>•</li> </ul>

<p>Remember - ABCD stands for Audience, Behavior, Condition and Degree.</p>	
<p>The <b>audience</b> does not change for ILT versus eLearning.</p>	<p>Instructor Presentation w/VO -----</p>
<p>Action verbs are still the basis for a good learning objective. The <b>behavior</b> element of your learning objectives should still mirror the real tasks learners need to perform on the job.</p> <p>Behaviors such as “demonstrate” take on new expectations with instructor-led training. For example, a set of learning objectives might include:</p> <ol style="list-style-type: none"> <li>1. The installer will <b>identify</b> the correct part for the repair.</li> <li>2. The installer will <b>demonstrate</b> correct installation of the selected part</li> </ol> <p>In an eLearning session, to “identify” and “demonstrate” might mean:</p> <p>“drag the picture of the correct part” “to the correct location on a picture of the assembly”</p> <p>Whereas in an ILT session it could mean :</p> <p>“retrieve the correct part from the cabinet” “bolt the part to the assembly and properly connect the wires”</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>● Behavior should duplicate on the job actions</li> </ul>
<p>The <b>condition</b> element provides parameters or context for the behavior to occur. Conditions can be much more “real world” for instructor-led training.</p> <p>Conditions such as “using only the tools provided” or “for an audience of at least 12 people” or “while standing on a ladder” are very different from what can be achieved with eLearning.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>● Conditions should be those found on the job</li> </ul>
<p><b>Degree</b> elements such as timing constraints can truly be tested - “can</p>	<p>Instructor Presentation w/VO</p>

<p>you drag the correct picture on the screen in 3 seconds” is much different than “can you properly install the part in 3 minutes”.</p>	<p>----- Key Point: Degree is job success</p>
<p>The key to writing good learning objectives is the same for eLearning and ILT - mimic the desired on-the-job performance as closely as possible.</p> <p>Take a minute and write 1 or 2 well-formed learning objectives for the Upfront Contracts course. Add them to your course design document.</p>	<p>Coach Animation ----- Animation note</p>

<b>Scene</b>	(M3S4.2) Icebreakers, Energizers & Recaps
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>Activities to check knowledge and practice skills are part of every course design. In addition to the usual activities, instructor-led training may also include activities that are not strictly related to the course material.</p> <p>Most of us have attended an in-person training where icebreaker or energizer activities were done poorly, or were overdone, and seem like a waste of time.</p> <p>But when done well they are an important part of the session. The instructional designer needs to put just as much thought and effort into these activities as they do for every other aspect of the course.</p> <p>An icebreaker activity is a way for participants to introduce themselves and to learn about the other participants. It starts building a comfort level and sets expectations about the course being a judgement-free place for participants to learn and share.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points</p> <ul style="list-style-type: none"> <li>● Icebreakers, Energizers, Recaps (IER) add value</li> <li>● IER need to be intentional and planned</li> </ul> <ul style="list-style-type: none"> <li>● Most ILT should have name game</li> <li>● Longer sessions (or those with significant interaction) should have personal sharing</li> </ul>

<p>Nearly all ILT should include a “name game” type icebreaker activity. For a longer course, especially one where participants will have significant partner or group interactions, an activity that involves some personal sharing is very valuable to begin creating relationships.</p>	
<p>Energizer activities are just what they sound like, a way to boost participant’s energy levels and refocus their minds.</p> <p>Energizers should be quick and active. They are most useful to combat the mid-afternoon drowsiness, or to break up long, information-heavy sections.</p> <p>Energizers should relate to the course material to help reinforce the material. This helps learners view them as valuable and not as silly or juvenile.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points</p> <ul style="list-style-type: none"> <li>● Quick, active and related to the content</li> </ul>
<p>A recap activity is a great way to review course material. They can be used at the end of a large section, or at the end of the day for a multi-day session.</p> <p>Recaps should challenge learners but heavy competition is not necessary and competition against other participants can backfire.</p> <p>Keep the challenge focused on the individual or the team improving over their previous performance.</p> <p>Small prizes (i.e. a piece of candy) are a surprisingly good motivator.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points</p> <ul style="list-style-type: none"> <li>● Review at end of the day or at end of a large section</li> <li>● Light competition can work</li> <li>● Simple prizes can motivate</li> </ul>
<p>There are many good internet resources with icebreaker, energizer and recap activity ideas.</p> <p>The most important things when planning an activity are to make it fun and make it relevant to the course.</p>	<p>Instructor Presentation w/VO -----</p> <p>See Appendix Z - References for icebreaker resources</p>
<p>How many icebreaker, energizer and recap activities should the Upfront Contract course include?</p>	<p>Coach Animation -----</p>

<p>Use the internet to find some activities you might include.</p> <p>Eventually you will add the activities to your course design document.</p> <p>For now you can just add the website URL so you can find them again.</p>	
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<b>Scene</b>	(M3S4.3) Equipment & Environment
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>All learning design should include practice activities that are as close to real-world conditions as possible.</p> <p>The “People, Places &amp; Things” section hinted at two situations where ILT can be especially good at achieving real-world conditions: when learning involves physical objects or specialized environments and when learning involves other people or group dynamics.</p> <p>ILT is especially good when activities can incorporate the specific equipment, conditions or environments that learners will face on the job.</p> <p>Feeling how a part snaps together is much more effective than hearing a “click” sound on a computer simulation.</p> <p>Having to disassemble and reassemble a piece of equipment multiple times because you didn’t get a connector aligned properly is a very effective teacher.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points</p> <ul style="list-style-type: none"> <li>• Actual equipment and environments is better for learning</li> </ul>
<p>What equipment or environments can be used to make activities more realistic in the Upfront Contracts course?</p> <p>List those items in the course design document.</p>	<p>Coach Animation -----</p>

<b>Scene</b>	(M3S4.4) Group Dynamics
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>eLearning just cannot compare to in-person training when the material involves <b>interacting with other people</b>.</p> <p>Learning how to lead others, or resolve conflict, or have difficult conversations takes practice with real people and no amount of computer simulation will get the same results as seeing how someone responds to what you say.</p>	<p>Instructor Presentation w/VO ----- Key Points</p> <ul style="list-style-type: none"> <li>• Soft skills involve other people</li> </ul>
<p>What part does “<b>interacting with other people</b>” play in using an Upfront Contract? How can you incorporate a realistic activity that involves other people in the course?</p> <p>Capture your ideas in the course design document.</p>	<p>Coach Animation -----</p>

<b>Scene</b>	(M3S4.5) Presentations
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>Tool suggestions and best practices for creating presentations will be covered later, in the “ILT Development” section.</p> <p>The important thing to consider during the course design is that visual aids, such as PowerPoint, are not the core of the session.</p> <p>What the instructor says and does are the core of an ILT session. The presentation slides are there to summarize and reinforce what the</p>	<p>Instructor Presentation w/VO ----- Key Points</p> <ul style="list-style-type: none"> <li>• Slides are to summarize and reinforce</li> <li>• What instructor says and does are the core</li> </ul>

<p>instructor has said.</p> <p>To help ensure that the visual aids do not become the focus, they should be one of the last things created for the course. By creating the other assets first it is easier to identify the summary points that need to be reinforced on the slides.</p>	
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## Quality & Consistency

<b>Scene</b>	(M3S5) Quality & Consistency
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>Do you have higher expectations for instructor-led training than for online training? Or maybe it seems that way because it is easier to give feedback about a poor session to an instructor than to a website?</p> <p>Either way... one of the big benefits of instructor-led training is also one of the big drawbacks - the instructor. Instructors add great value by being able to adjust to a changing classroom environment or being able to explain a concept in a different way to help the learners understand.</p> <p>This ability to be dynamic also means that two instructors will not present the material in exactly the same way. In fact, the same instructor will not present the material in exactly the same way from one session to another.</p> <p>As the instructional designer, you have a responsibility to support quality and consistency as you design the course. There are several ways you can do this.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>● This is an intro/overview to the slides that follow.</li> <li>● Instructor is the key to ILT</li> <li>● ID needs to build in quality &amp; consistency</li> </ul>

<b>Scene</b>	(M3S5.1) Stakeholder Input
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>When we talk about stakeholders we often think about the client and the learner.</p> <p>A very important group of stakeholders, especially during course design, are the people who will deliver the course - the trainers.</p> <p>Just as your craft is to create training, their craft is to deliver training. Whenever possible, get input from some of the trainers during the course design process to benefit from their experience. They will have good insight to how the course design can support quality and consistent delivery.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Input from facilitators / trainers helps build-in quality and consistency</li> </ul>

<b>Scene</b>	(M3S5.2) Instructor Prerequisites
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>One way to build in quality and consistency is to specify the qualifications of people who deliver the course. The course design could include a statement like:</p> <p style="padding-left: 40px;">The trainer must have earned certification in the MRP software and attended a train- the-trainer course within the past two years.</p> <p style="padding-left: 40px;">OR - a person may qualify as trainer by attending a train-the-trainer course within the past two years and serving as assistant trainer for a minimum of four sessions of this training.</p> <p>Specifying a minimum qualification increases the likelihood that the</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Qualified instructors</li> <li>• SME not automatically good instructor</li> </ul>

<p>instructor knows the material well enough to prepare the presentation (if it is not provided) and handle questions in the classroom.</p> <p>However, being an expert in the subject does not make someone a good trainer. Experts often focus on the content and not the learner. They may stray from the course material, may go into too much detail, may not recognize learner confusion or may simply be a poor presenter.</p> <p>Delivering training is a skill. Even an expert on the course subject needs to learn how to be a good trainer.</p>	
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<b>Scene</b>	(M3S5.3) Trainer Flexibility
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>How much flexibility the trainer has - or how strictly they must follow the course material - is dictated by the circumstances of the course.</p> <p>For example, compliance training must be followed exactly while customer service onboarding should be quite dynamic.</p> <p>The flexibility offered to the trainer should also take into consideration the experience of the trainer. More experienced trainers can be given more flexibility to adapt the delivery to the needs of the learners while less experienced trainers might not have the skills or confidence to vary from the course design.</p> <p>The course design should include a statement of how strictly the material must be delivered.</p> <p>A common phrase is “make it your own” - which means the trainer</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• More flexibility allows more dynamic class</li> <li>• More flexibility results in less consistency</li> <li>• More flexibility - quality depends on instructor abilities</li> <li>• Less flexibility better for less experienced instructors</li> </ul>

<p>should closely follow the course design but should not use it as a script. They should use their own words and style to deliver the material without adding, omitting or rearranging material.</p>	
<p>Do you think it would be better to have an expert who is an “okay” trainer, or a great trainer who knows nothing about the subject except what is in the course?</p> <p>Think about how strictly the trainer must follow your Upfront Contracts course design.</p> <p>Add a section to the course design document to capture the trainer prerequisites and how much flexibility the trainer has.</p>	<p>Coach Animation -----</p>

<b>Scene</b>	(M3S5.4) Learning Evaluation
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>Course designers can help ensure quality and consistency of learner skills by defining the skill assessment criteria as part of the course design.</p> <p>Typically the evaluation criteria is stated directly in the learning objectives. There are times when the criteria are more flexible or more subjective.</p> <p>In these cases, the designer should provide a rubric or checklist so learners know the criteria they must meet and the instructor has a way to be consistent.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Evaluation design includes details</li> <li>• Evaluation can support flexibility</li> </ul>
<p>Think about how you will evaluate learning for the Upfront Contracts course. Can you incorporate evaluation at all four Kirkpatrick levels?</p>	<p>Coach Animation -----</p>

Add a section to your course design document and capture ideas for how to evaluate the learners.	
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<b>Scene</b>	(M3S5.5) Course Testing
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>“Testing” an instructor-led course means having a facilitator, not the instructional designer or the SME, deliver the entire course to a group of learners from the target audience.</p> <p>Sometimes the target audience is so inexperienced that they do not make a good test group. In this case, the group should also include some people who can give feedback about things the target audience might not have noticed, or might not be able to put to words.</p> <p>The purpose is the same as with eLearning - to find issues that the SME, designer and developer have overlooked because they are too familiar with the material.</p> <p>Look for problems such as:</p> <ul style="list-style-type: none"> <li>• areas where the material is not explained clearly</li> <li>• activities with incomplete or confusing instructions</li> <li>• sections that have too much or not enough time allotted</li> <li>• missing, excess or unrelated content</li> <li>• technology problems</li> <li>• transitions that are not smooth</li> </ul> <p>Apply feedback from the test sessions and retest as many times as needed to get things right.</p> <p>It can be useful to categorize issues identified during the tests to help</p>	<p>Multiple slides as necessary.</p> <p>Key Points</p> <ul style="list-style-type: none"> <li>• Test the session with actual facilitator</li> <li>• Audience is actual learners</li> <li>• Find issues that designer did not expect</li> <li>• Collect, prioritize and apply feedback</li> <li>•</li> </ul>

prioritize further development - e.g. high priority issues must be fixed before the course can be delivered, low priority issues can be deferred until after the initial deployment.	
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<b>Scene</b>	(M3S5.6) Ongoing Quality
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>Ensuring quality and consistency should be ongoing.</p> <p>The trainers will study the course - they will find typos and instructions that don't make sense. They will figure out how to adjust activities for different venues and group sizes. They will learn which groups need more time for a lesson and which ones take less.</p> <p>They are the experts on delivering your course. Consider how you will collect and apply feedback from the trainers on ways to improve the course.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Get instructor feedback over time</li> </ul>

<b>Scene</b>	(M3S5.7) Practice
<b>Characters</b>	Coach

<b>Narration</b>	<b>Commentary</b>
<p>By this point you should have a pretty good vision for your Upfront Contracts course. Take some time now to fill in the gaps in your design document.</p> <p>Remember - don't spend a lot of time on the wording or formatting, just capture the ideas for now.</p>	<p>Coach Animation -----</p>

How long do you think the course will be?

How many lessons will there be?

What will the topic be for each lesson?

Can you create an outline of the whole course including the lessons, activities and evaluations?

A good course design document will have sections that we didn't cover here because they are the same as if you were designing for eLearning.

Can you add those sections now and write some of the content for them?

As you gain experience with designing courses, you will get better at estimating how long it takes to complete different tasks. Make an estimate now of how long you think it will take to finish the Upfront Contracts course design. Keep track of your time so you can check your estimate when you are done.

## Module 4 - ILT Development

<b>Scene</b>	(M4S1) Introduction
<b>Characters</b>	Instructor

<b>Narration</b>	<b>Commentary</b>
<p>So far this course has been about designing instructor-led training. This final module is about developing for an instructor-led course.</p> <p>In this lesson you will learn about creating four course artifacts that are unique to instructor-led training: the schedule, a facilitator guide, a participant guide and the presentation.</p>	<p>Instructor Presentation w/VO -----</p>

## Schedule

<b>Scene</b>	(M4S2) Schedule
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>The course schedule is an accumulation of the time allotted to the individual lessons and the time allocated for breaks.</p> <p>If the course is only an hour, or even 2-3 hours, a formal schedule may not be necessary. But if the course runs all day, or runs across multiple days, then you'll definitely need to give facilitators and learners a view of how the time is being used.</p> <p>The schedule should be written up in a summary format that is easy to follow the flow of the course.</p>	<p>Instructor Presentation w/VO -----</p> <p>Show example schedule from TBD</p>

Time	Length (minutes)	Topic
8:00am	10	Welcome & Housekeeping
8:10am	5	Course overview
8:15am	15	Introductions
8:30am	45	Needs Assessment
9:15am	45	Learning Objectives
10:00am	15	break
10:15am	45	Adult Learning Theories
11:00am	45	Learning Evaluation
11:45am	60	lunch
12:45pm	45	Lesson Design
1:30pm	45	Create Positive Learning Environment
2:15pm	15	break
2:30pm	45	Presenter Best Practices
3:15pm	45	Presentation Practice
4:00pm	15	Summary and Wrap Up

Detailed lesson times should be included in the course design document and the Facilitator Guide to allow proper facilitator preparation.

~~Detailed lesson times should not be included in the Participant Guide as that level of detail can be a distraction to some participants and it can become a maintenance challenge—too much detail has a ripple effect when making changes to the documents.~~

The Participant Guide may not need to include the detailed schedule times. For some audiences a detailed course schedule works, while for other

<p>audiences that level of detail can be a distraction.</p> <p>Also, keep in mind that a detailed course schedule can add more work during maintenance because a small change at one point can mean needing to adjust to listed times for the rest of the schedule.</p>	
<p>Add a time duration to each lesson and activity in your Upfront Contracts course outline.</p> <p>Use this information to create a preliminary course schedule in your design document. Go ahead and practice creating a schedule even if you don't think your course really needs one.</p>	<p>Coach Animation -----</p>

Facilitator Guide

<b>Scene</b>	(M4S3.1) Facilitator Guide #1
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>“The facilitator guide gives instructors a plan for the learning experience. Instructors use the pointers, notes, and directions to prepare for and lead the program.”</p> <p>-- ATD facilitator guide job aid</p>	<p>No Narration ----- Displayed on-screen</p>
<p>In some organizations the Facilitator Guide is a simple document with no “frills” while in other organizations it may be quite “pretty” and follow the organizations style guide with colors and branding images.</p> <p>Often the organization will have a facilitator guide template to give you a start on both the style and the organization of materials. If the organization does not specify, then consider the value (effort versus benefit) of making the guide pretty versus leaving it plain.</p> <p>The formatting conventions used in the Facilitator Guide will be dictated</p>	<p>Instructor Presentation w/VO -----</p> <p>See Appendix 4 - Example Formatting Conventions</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Facilitator Guide formatting not as important as content</li> </ul>

<p>by the organization's template or style guide, if one exists. If a style guide exists the Facilitator Guide should reference it. If one does not exist, the Facilitator Guide might include a section to define the formatting conventions used in the document.</p>	
<p>Save The Pine Trees does not have a style guide or a facilitator guide template.</p> <p>Based on what you know about Save The Pine Trees, will you make the Facilitator Guide pretty or will you leave it plain?</p> <p>Create a new document for your Upfront Contracts course Facilitator Guide. Add a title page, a section heading for the course overview and a section heading for each lesson in your course outline.</p>	<p>Coach Animation -----</p>

<b>Scene</b>	(M4S3.2) Facilitator Guide #2
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>There are many considerations when creating the Facilitator Guide that are not related to the course design, such as:</p> <p>Writing Style - the style should be clear and concise, using brief sentences and simple words. Use language and terminology of the subject field.</p> <p>Level of Detail - should the facilitator guide provide only a general plan for each lesson, or should it be a complete script of what to say and when? Probably something in the middle.</p> <p>Note that more detail can:</p> <ul style="list-style-type: none"> <li>• Help ensure consistency between instructors and across sessions</li> </ul>	<p>Instructor Presentation w/VO -----</p> <p>As many slides as necessary for good visual design</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Use language of the subject field</li> <li>• Level of detail influenced by instructor experience</li> <li>• Production details determined by guide length and instructor experience</li> </ul>

- Help keep SME-instructors on track so they do not stray or dive too deep
- Provide guidance (and confidence) to less-experienced instructors
- Be restricting to experienced facilitators that prefer a more dynamic delivery

Navigation - does the guide need things like page numbers, table of contents, index, glossary and appendices of reference material?

Consistency - consistent writing style and formatting style give a professional appearance and make the guide easier to use.

Distribution - will the guide be distributed to instructors electronically or as a printed manual?

If electronically, consider the devices that instructors may use to view it and the file format best suited to those devices. Does the file need to be editable so the instructor can annotate?

If they will be printed - do they need to be in color or is black & white sufficient? What kind of binding and covers will be used for printed versions?

Content - in addition to the course information, a facilitator guide may include information useful for delivering the course.

This could include things like guidelines for choosing a venue, suggestions for room layout, recommendations for technology and even a planning schedule for when to make reservations and open registration.

In all cases - be sure to have stakeholders review a sample of the guide early to confirm any assumptions and recommendations before they become costly (or time consuming) to change.

- Professional writing and appearance improve usability
- Electronic vs Printed distribution

Write a couple of paragraphs for the Course Overview section of the Facilitator Guide to capture your writing style and formatting conventions.	Coach Animation -----
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<b>Scene</b>	(M4S3.3) Facilitator Guide #3
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>The Facilitator Guide will include a section for each lesson in the course.</p> <p>Each section should begin with general information about the lesson, such as: time allotted, learning objectives, materials needed, and setup required.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Lesson Info</li> </ul>
<p>In your Upfront Contracts Facilitator Guide, add a section for each lesson with the general information about the lesson.</p>	<p>Coach Animation -----</p>

<b>Scene</b>	(M4S3.4) Facilitator Guide #4
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>The largest portion of each lesson will be the lesson description. This is where you craft the content into a lesson using the writing style and level of detail that you decided above.</p> <p>Use the same best practices as with eLearning - organize the information, create a natural progression, build on previous knowledge and always think about what the learner needs to know, not about how</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Lesson Description - same as eLearning: Organize, natural progression, build</li> </ul>

<p>to share all of the content you have.</p> <p>Include images or other visuals that are important to the concepts, especially if they will be shown to the learners.</p> <p>Activities may be integrated into the lesson, or they may be described separately depending on the circumstances.</p> <p>For example, a lesson on workplace safety could be a presentation followed by a game-show activity to check the knowledge.</p> <p>Or - the lesson could be built into the activity by having the group review an accident report and discuss missed opportunities that would have prevented the accident.</p>	<p>on previous knowledge</p> <ul style="list-style-type: none"> <li>• Visual</li> <li>• Activities integrated or as follow up to instruction</li> </ul>
<p>Write a first draft of your Upfront Contract lesson descriptions. Don't try to make it perfect, just pull in the bits of content and capture your ideas.</p> <p>Rearrange things to get a natural progression of information. Use "<i>placeholder</i>" notes for things you are not sure of yet.</p>	<p>Coach Animation -----</p>

## Participant Guide

<b>Scene</b>	(M4S4) Participant Guide
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>"A helpful way to approach a participant guide is to think of it as a space for recording thoughts, asking and answering questions, and [capturing] key takeaway information learners will use on the job." -- Brian Ziemba, Caveo Learning</p>	<p>No Audio</p>
<p>Not every course needs a participant guide, in some cases a simple handout or job aid is sufficient.</p>	<p>Instructor Presentation w/VO -----</p>

<p>The length of the course, complexity of the material and volume of takeaway information should be considered to determine if a participant guide is appropriate. Feedback from the test groups will help identify the needs.</p> <p>Unlike the Facilitator Guide, the Participant Guide should always be “pretty” - it is a takeaway item that the participants will (hopefully) reference later.</p> <p>It can be graphical, or not, but should be visually appealing with appropriate logos and branding. A well done Participant Guide can increase the perceived value of the course (and even improve the smile sheet evals).</p>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Most courses should have some kind of take-away</li> <li>• Take-aways should always be “pretty”</li> <li>• Take-aways are “value add” items</li> </ul>
<p>The Participant Guide should be “interactive” - that is, it should include key information from the course and it should engage the learner.</p> <p>Some ways a static document (printed or electronic) can accomplish this:</p> <ul style="list-style-type: none"> <li>• statements with fill-in-the-blank spaces</li> <li>• diagrams to label</li> <li>• open-ended questions for the learner to answer from the presentation material</li> <li>• prompts for analysis or reflection with space to capture thoughts</li> </ul>	<p>Instructor Presentation w/VO -----</p>
<p>The guide should contain key concepts, terms, processes and best practices from the course. It should contain references, checklists and job aids for later use.</p> <p>Wide margins and extra white space encourages participants to take notes. Consider a space at the end of each section or lesson labeled “summary” or “takeaways”.</p> <p>Oh - and, printing a “notes view” of the presentations slides is NOT a participant guide!</p>	<p>Instructor Presentation w/VO -----</p>

<p>Does your Upfront Contracts course need a Participant Guide?</p> <p>If so - create a new document and start creating the sections for your guide.</p> <p>If not - add a section to your design document with some notes about what takeaway assets you will provide instead. Checklists? Job Aids? Quick Reference Guides?</p>	<p>Coach Animation -----</p>
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## Presentations

<b>Scene</b>	(M4S5) Presentations
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>When I say “presentation”, do you automatically think of PowerPoint? Are there other ways of presenting information to the learners?</p> <p>Just like everything else in a course, the method of presenting should be chosen because it is the most appropriate for the content, setting and learners.</p> <p>PowerPoint is common but there are other computer-based presentation tools such as Canva, Prezi, and Visme.</p> <p>Often a flip-chart or whiteboard can be an effective visual aid. In some cases no visual aids are needed - a simple demonstration with some instructor commentary may be the most effective method.</p> <p>The presentation, and any visual aids it uses, may be provided as part of the course material or the trainer may be responsible for developing it themselves.</p>	<p>Instructor Presentation w/VO -----</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>● PPTx not the only option</li> <li>● Simple methods work too</li> <li>● Sometimes nothing needed</li> <li>● Always “pretty”</li> </ul>

<p>Regardless of who creates them, the visual aids are part of the image projected by the course and should follow the organization's style guide or use the organization's template.</p>	
<p>Learning to create good presentations and visual aids is beyond the scope of this course however there are a couple of aspects that are relevant here:</p> <p>Remember what we learned in the previous module: The visual aids are to summarize and reinforce what the instructor has said and done. Keep them simple.</p> <p>Remember everything you know about how people learn, it applies here. Organize information as bite-size chunks that build on previous information or build on their previous knowledge. Make sure they know why it is relevant.</p> <p>Remember everything you know about graphic design, it applies here. Be intentional about style, color, font and layout. Be visual, minimize text and bulleted lists.</p>	<p>Instructor Presentation w/VO -----</p> <p>See Appendix Z - References for some resources about creating good presentations.</p>
<p>Decide on the presentation method for your Upfront Contracts course and what visual aids are needed.</p> <p>Add this information to your course design document.</p>	<p>Coach Animation -----</p>

## Summary

<b>Scene</b>	(M5S1) Summary
<b>Characters</b>	Instructor, Coach

<b>Narration</b>	<b>Commentary</b>
<p>Congratulations - now you know the major elements of creating an instructor-led training course and how it differs from creating eLearning.</p>	<p>Instructor Presentation w/VO -----</p>

<p>Let's summarize what you have done:</p> <ul style="list-style-type: none"> <li>• You learned the pros and cons of eLearning, blended learning and instructor-led training. You used that to recommend a delivery method and learned that sometimes the client overrules your recommendation (that part is not unique to instructor-led training).</li> <li>• You created a course design document that captures information that is unique to an instructor-led training course.</li> <li>• You saw how learning objectives can be tailored for instructor-led training and tried your hand at creating a couple.</li> <li>• You learned about icebreakers, energizers and recap activities which are unique to instructor-led training. You also saw how to tailor your content-specific activities to the environment of ILT.</li> <li>• You considered quality control issues that are unique to instructor-led training and added information in your design document to address these concerns.</li> <li>• Finally, you learned about some course artifacts that are unique to ILT. You created a course schedule and a shell for a facilitator guide, and may have created a shell for a participant guide. Though you didn't learn how to create a presentation, you did learn what role the presentation has in instructor-led training.</li> </ul>	
<p>You've got a great start on the Upfront Contracts course for Save The Pine Trees.</p> <p>Take some time and finish writing your design document and facilitator guide, then post them to the Academy Cohort Facebook group for peer</p>	<p>Coach Animation -----</p>

feedback.	
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## Append 1 - Save The Pine Trees background information

Background information on Save The Pine Trees, including a summary of the challenges that prompt this project, is in the document:

“Save The Pine Trees - background information”

<https://docs.google.com/document/d/13WqUGemZ3njyOcDgvH7MfQnNl8VfnWdTtqNUD83AaPM>

## Appendix 2 - Upfront Contracts information dump

Tom Ullrich is a member of the Save The Pine Trees board of directors and is a successful sales professional. Tom suggests training the volunteers making recruitment calls on a technique called “upfront contracts”. Tom provided information about the technique in a document:

“ILT Developer - upfront contracts SME info”.

<https://docs.google.com/document/d/1FWoHLcBP3ws2jmhRIS7dJfTuTfsUbipZCW5M5AbbHVY>

## Appendix 3 - Templates

Course design document example from the IDOL Academy lesson:

“Course Outlines and Instructional Design Documents Workshop with Mia Varnadoe”

<https://docs.google.com/document/d/1FehuavtP9RuNcrPKIjcHHo50VjYjgnsDQ5CNgm7ydSM>

[TODO reference a facilitator guide template]

[TODO reference a participant guide template]

## Appendix 4 - Example Formatting Conventions

If the organization does not have a style guide or facilitator guide template, consider adding a section to document the conventions used in your facilitator guide. This is not necessary but adds a level of professionalism and is especially helpful for very long facilitator guides.

Here are a few example conventions that could be used:



This icon represents an individual activity.



This icon represents a group activity.



This icon indicates that the highlighted information should be delivered using the specific wording or phrases provided.



This icon indicates that the highlighted information is for the facilitator only and should not be delivered to the participants.



This icon indicates an important point that should be stressed to the learners.

*Information in italics is for facilitator reference such as referring to an appendix, or the URL of a website.*

**SAY:** Indicates a message to communicate to the learners

**DISCUSS:** Indicates a concept to briefly discuss

**ASK:** Questions to engage learners

**DO:** Instructions for a demonstration or exercise

## Appendix Z - References

Icebreakers & Energizers

<https://www.sessionlab.com/blog/icebreaker-games/>

[https://sixth.ucsd.edu/\\_files/\\_home/student-life/icebreakers-teambuilding-activities-energizers.pdf](https://sixth.ucsd.edu/_files/_home/student-life/icebreakers-teambuilding-activities-energizers.pdf)

<https://www.businesstrainingworks.com/training-resource/free-icebreakers-for-training-workshops-and-seminars/>

[https://newunkampus.unssc.org/pluginfile.php/34178/mod\\_folder/content/0/Facilitation%20Skills%20Background%20material/Entelechys%20Famous%20Icebreakers.pdf?forcedownload=1](https://newunkampus.unssc.org/pluginfile.php/34178/mod_folder/content/0/Facilitation%20Skills%20Background%20material/Entelechys%20Famous%20Icebreakers.pdf?forcedownload=1)

A good pro/con on facilitator guides along with some best practices for creating them.

<https://www.trainSMARTinc.com/the-trainers-tool-everyone-loves-to-hate-the-facilitator-guide/>

Recommendations and best practices for ILT facilitators

<http://www.workshopexercises.com/Facilitator.htm>

Best practices for creating presentations

<https://www.brightcarbon.com/blog/12-training-presentation-ideas/>

Explanation of “trainer” vs “facilitator” vs “instructor”

<https://www.trainingcoursematerial.com/free-trainer-tips-blog/trainer-facilitator-or-instructor-what-s-the-difference>

Information and references about how often to take breaks and how long they should be

<https://www.inc.com/neil-patel/when-how-and-how-often-to-take-a-break.html>

How does culture impact the training environment?

<https://www.trainingzone.co.uk/develop/talent/the-impact-of-culture>