Training Guidelines

For ILT, VILT, and Blended Program Design

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1. Introduction

These guidelines ensure that all instructor-led training (ILT), virtual instructor-led training (VILT), and blended programs delivered by or in partnership with Techwritez are interactive, outcome-driven, and measurable.

Who should use this?

- Facilitators and trainers
- Training designers and curriculum developers
- Training coordinators and program managers
- Subject-matter experts leading workshops

2. Training Program Planning

2.1 Needs Analysis & Objectives

- Conduct **needs assessment** interviews with stakeholders to define:
    - Current performance gaps
    - Desired behaviors and outcomes
    - Success metrics (e.g., productivity, quality, safety, compliance)
- Define **SMART learning objectives**:

    - *Specific*: What exactly will learners do?
    - *Measurable*: How will you know they succeeded?
    - *Achievable*: Is this realistic for the audience in the timeframe?
    - *Relevant*: Does this address the business need?
    - *Time-bound*: When will this be achieved?

2.2 Audience Analysis

- Map learner **roles, experience levels, and learning preferences**.
- Identify barriers (language, literacy, time, motivation).
- Determine prior knowledge and prerequisite skills.
- Note any accessibility needs (language, hearing, visual, mobility).

2.3 Curriculum Design

- **Break down the structure**:
    - Total program duration (hours/days)
    - Number of sessions and typical length (2–4 hours per session recommended)
    - Optional prerequisites or self-paced modules
    - Optional follow-up reinforcement
- **Content sequence**: Build from foundational to advanced; group related topics.
- **Instructor time allocation**: Rule of thumb – 20% input, 80% interaction and practice.

3. Facilitator Preparation & Skills

3.1 Facilitator Competencies

Core skills every facilitator must have:

- Subject-matter expertise (knows the content cold)
- Instructional skill (can teach, not just know)
- Communication clarity (explains concepts simply)
- Facilitation (guides discussion, manages group dynamics)
- Empathy and psychological safety (welcomes questions, creates trust)

3.2 Train-the-Trainer Program

Provide facilitators with:

- **Session guide** (detailed agenda, activities, timings, talking points)
- **Participant materials** (workbooks, handouts, job-aids)
- **Practice opportunity** (dry run or pilot delivery)
- **Tech orientation** (for VILT: platform features, breakout rooms, poll tools)

3.3 Facilitator Resources

Maintain a **facilitator handbook** with:

- Learning objectives and success criteria
- Difficult questions and suggested answers
- Stories or examples that work well
- Troubleshooting tips for common issues
- Timing guidance and checkpoint checks

4. Session Design & Delivery

4.1 Sample 3-Hour Session Agenda

Time	Activity	Format	Notes
0:00–0:05	Welcome, objectives, agenda	Trainer input	Set tone; clarify what success looks like
0:05–0:20	Icebreaker / context-setting	Interactive	Build rapport; frame relevance
0:20–0:40	Key concept 1 (input + example)	Input + case study	Explain, then show real-world application
0:40–0:55	Practice activity 1 (paired / group)	Small group activity	Apply concept to a scenario
0:55–1:00	Debrief & questions	Group discussion	Check for understanding; surface confusion
1:00–1:10	**Break**	—	Offline time
1:10–1:30	Key concept 2 (input + example)	Input + demo	Continue pattern: explain → apply

1:30–1:45	Practice activity 2 (role-play / simulation)	Interactive activity	Learners practise skill under guidance
1:45–1:50	Debrief & coaching	Group discussion	Highlight learning; share feedback
1:50–2:00	**Break**	—	Offline time
2:00–2:20	Key concept 3	Trainer input	Final concept
2:20–2:35	Integrated activity (case / decision scenario)	Group or individual	Combine all three concepts
2:35–2:50	Debrief, coaching, final Q&A	Facilitated discussion	Summarize takeaways
2:50–3:00	Action planning & close	Individual reflection	Personal commitment or next steps

4.2 Activity Design Principles

- **Relevance**: Every activity mirrors a real job situation.
- **Safety**: Practice happens in a low-risk environment; mistakes are learning.
- **Feedback**: Participants get coaching immediately, not judgment.
- **Reflection**: Debrief activities to connect practice to real work.

4.3 Facilitation Techniques

Active listening

- Pause after questions; allow silence so learners think.
- Ask follow-up questions to deepen understanding.
- Summarize participant responses to confirm understanding.

Questioning

- Use open-ended questions: “What did you notice?” vs. “Is this right?”
- Ask “Why?” and “How?” to prompt deeper thinking.
- Distribute questions; don’t always ask volunteers.

Group management

- Set ground rules (punctuality, confidentiality, participation).
- Ensure all voices are heard; invite quieter participants.
- Redirect dominators respectfully: “Great point. Let’s hear from someone else.”

Conflict resolution

- Address disagreements as learning opportunities.
- Use phrases like: “That’s a valid perspective. Here’s another way to think about it…”
- Separate the person from the idea: critique ideas, not people.

5. Participant Experience & Engagement

5.1 Pre-Training Communication

- Send **agenda, objectives, and logistics** at least 1 week prior.
- Include: date, time, location (or meeting link), instructor name, tech requirements.
- Request **pre-work** if applicable (reading, self-paced module, survey).
- Confirm attendance; send reminders 1 day and 1 hour before start.

5.2 On-Time Start & Energy Management

- Start **exactly on time**; respect participants’ schedules.
- Plan **breaks every 45–60 minutes**; longer for half-day sessions.
- Vary activity types to prevent fatigue:
  - Input (lecture) → Practice (active) → Debrief (discussion) → Break

5.3 Participant Engagement Metrics

Track during the session:

- Hand-raising frequency
- Quality of questions asked
- Participation in activities (% engaged)
- Body language and energy level

Adjust in real time if engagement dips (shift to an activity, shorten input, add an energizer).

6. Virtual Training (VILT) Best Practices

6.1 Platform & Technical Setup

- Choose platform based on needs:
  - **Zoom, Teams, Webex** – general VILT
  - **Adobe Connect, Hopin** – advanced interaction features
  - **LMS with built-in VILT** – integrated tracking
- Test all features **24 hours before** the session (screen share, polls, breakout rooms, chat, recordings).
- Have a **backup plan** (dial-in numbers, alternate platform).

6.2 Virtual Facilitation Techniques

- **Eye contact**: Look at the camera when speaking.
- **Pacing**: Speak slightly slower than in person; pause between points.
- **Engagement tools**: Use polls, chat, Q&A, whiteboards frequently.
- **Breakout rooms**: Use for pair/group work; assign groups intentionally.
- **Chat management**: Monitor questions and side conversations; address thoughtfully.

6.3 Virtual Activity Design

- **Breakout room activities** (10–15 minutes):
  - Assign 3–4 people per room.
  - Provide a clear prompt or scenario (in chat and verbally).
  - Assign a note-taker to report back.
  - Bring groups back to main room; hear 2–3 summaries.
- **Interactive elements every 5–7 minutes**:
  - Poll – quick vote on a decision or opinion.
  - Chat – share an example or reflection.
  - Screen annotation – draw or mark up together.

6.4 Virtual Logistics

- Encourage **participant video** to build connection.

- Use a **start buffer**: open the room 5 minutes early.
- Limit VILT sessions to **2–2.5 hours** without extended breaks.
- **Recording**: Record with permission; share within 24 hours.

7. Blended Training Integration

7.1 Blended Model – When to Use What

- **Pre-training eLearning**
    - Self-paced, foundational content
    - Prepares learners so ILT time is focused on practice and discussion
    - Example: 1–2-hour eLearning module, then 2-hour ILT workshop
- **ILT/VILT classroom**
    - Facilitated discussion, coaching, hands-on practice
    - Real-time Q&A and problem-solving
    - Example: 2–4-hour workshop with interactive scenarios
- **Post-training reinforcement**
    - Microlearning nudges (1–2-minute clips)
    - Job-aids and reference guides
    - Online community or discussion forum
    - Optional check-in sessions or coaching 2–4 weeks post-training

7.2 Coordinating Content & Messaging

- Ensure eLearning and ILT **reinforce, not repeat**:
    - eLearning introduces concepts.
    - ILT deepens through practice and discussion.
    - Post-training reinforces application.
- Use **consistent terminology and examples** across all formats.
- Maintain a **single source of truth** (master content document) to avoid version conflicts.

8. Evaluation & Feedback

8.1 Kirkpatrick's Four Levels of Evaluation

Level 1 – Reaction (Did they like it?)

- Post-session survey: facility, facilitator clarity, pace, relevance.
- Quick rating: 1–5 scale on overall satisfaction.
- Administer at end of session (paper or online, 2–3 minutes).

Level 2 – Learning (Did they learn it?)

- Knowledge check: quiz or assessment immediately post-training.
- Skill demonstration: observed practice, role-play feedback.
- Administer in the last 15 minutes of the session.

Level 3 – Behavior (Are they applying it?)

- Manager check-in: ask manager if they see behavior change on the job.
- Self-report: ask participant "How are you using this?"
- Administer 4–6 weeks post-training.

Level 4 – Results (Is business impact happening?)

- Productivity metrics (output, efficiency)
- Quality metrics (errors, defects, customer satisfaction)
- Safety metrics (incidents, near-misses)
- Compliance metrics (audit results, violations)
- Compare pre- vs. post-training data over 3–6 months.

8.2 Post-Training Feedback

Administer a **brief survey** (3–5 questions) immediately after the session.

Ask:

- How relevant was this to your job?
- How confident are you to apply this?
- What is your biggest takeaway?
- What would improve this training?

Action on feedback: Summarize findings, share with facilitator, and adjust for the next cohort.

9. Pre- and Post-Training Support

9.1 Pre-Training

- **Communication**: Send logistics, objectives, and prep work (if any).
- **Accessibility**: Confirm any accommodations (interpretation, large-print materials, etc.).
- **Tech prep** (for VILT): Provide a tech guide or host a short practice session.
- **Motivation**: Explain relevance to learner's role or career; build interest.

9.2 Post-Training: 30–60 Days

- **Reinforcement**: Send microlearning tips or quick reference guides.
- **Application support**: Offer optional office hours or a Q&A forum.
- **Accountability**: Encourage managers to ask "How are you using this?"
- **Troubleshooting**: Provide job-aids for common sticky situations.

9.3 Ongoing Support: 3–6 Months

- **Booster session**: Optional 30-minute refresher.
- **Community**: Foster peer learning (discussion forum, peer coaching).
- **Measurement**: Gather data on on-the-job behavior and business impact.
- **Certification**: Where applicable, offer follow-up certification or advanced modules.

10. Facilitator Checklist

Pre-Training (1 Week Before)

- Session guide and participant materials finalized and distributed.
- Facilitator trained on content and activities (if new to this training).
- Tech tested (VILT: platform, screen share, polls, recordings).
- Logistics confirmed (room, seating, AV, refreshments, or meeting link).
- Participant roster confirmed; accommodations requested.

Pre-Training (1 Day Before)

- Slides and materials reviewed one more time.
- Room setup checked: seating, AV equipment, whiteboards, sticky notes, markers.

- Troubleshooting plan in place (backup tech, co-facilitator, etc.).

Start of Session

- Start on time (even if a few are late).
- Welcome, objectives, agenda, and ground rules stated clearly.
- Tech checked: recording, participant video/audio, breakout rooms (VILT).

During Session

- Activities follow agenda and timings; adjusted as needed based on engagement.
- Feedback is immediate, coaching-focused, and specific.
- All voices heard; quieter participants invited to contribute.
- Break times honored.
- “Parking lot” used for off-topic questions; addressed before close.

End of Session

- Action planning or reflection exercise completed.
- Evaluation forms distributed (paper or online link).
- Next steps and reinforcement resources explained.
- Participants thanked; session ends on time.

Post-Training

- Recording sent within 24 hours (if recorded and approved).
- Feedback summary reviewed and shared with team.
- Notes on adjustments for next cohort documented.
- Follow-up support (office hours, resources) launched.

Contact & Support

For questions or updates to these guidelines, contact **Techwritez Training Design Team**.