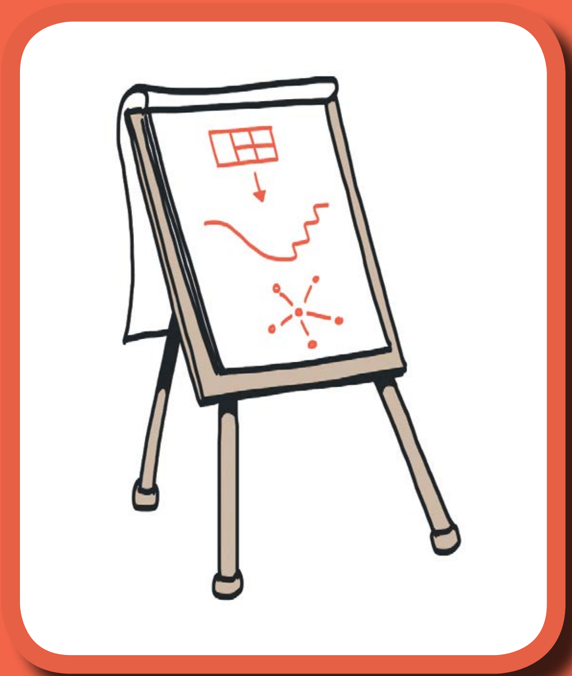
Training with the Karin de Galan method



Colophon
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Training with the Karin de Galan method

Training can be a challenging profession. It is the trainer's job to make participants truly learn and that doesn't happen by itself. A participant who doesn't see the need, a client with too vague a requirement, an activity that just won't work. How do you ensure that your training runs smoothly and that the participants learn things they can apply in practice?

How do you ensure that your training runs smoothly?

With a keen eye for what works and what doesn't, Karin de Galan has developed a method where every aspect of the trainers' craft is addressed. How to question clients further, how to pick out activities, how to direct learning procedures, how to straighten out kinks in the group process, how to project a professional attitude - The method will give you a grip on your training, from concept to completion.

Seven steps

Karin de Galan's method comprises seven steps which we will cover only briefly in this introduction.

1. Look at your participants' practices
2. Choose your focus
3. Lure them into learning
4. Give them something to hold on to
5. Let them practice step by step
6. Keep them safe
7. Give some professional love

1. Look at your participants' practices

The goal of a training is that participants acquire new knowledge and skills they can apply in their work. That's why the first step towards a successful training is to put yourself in their shoes and start by examining their current practices. If you don't begin here, but take your own ideas as the point of departure instead, it will be very hard later on in the process to determine which subjects are relevant and which ones are not. In addition, the exercises and examples will align less well with the participants' experiences.

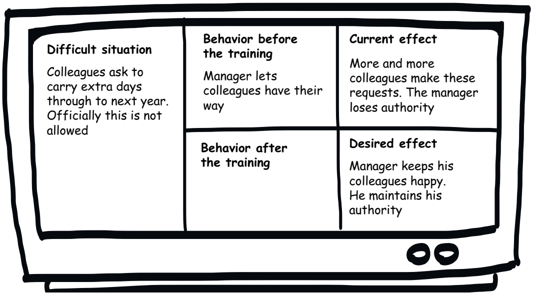
How do you find out what it is the participants need to learn? Asking for learning goals usually doesn't work because they often don't know (yet) themselves what they need. What does work is to analyze their current practices with the help of three core questions.

- What situations do the participants find difficult?
- What exactly do they do in these situations?
- What effect does their behavior have in these situations?

Imagine that a manager wants to take a training to develop management skills. You would like to know what he finds difficult. He tells you that many of his colleagues ask if they can carry vacation days through to the following year. Officially that's not allowed, but he understands why they would want to, which is why he gives in on many occasions. The consequence of this however is that more and more people make similar requests and his authority is undermined.

With this sort of conversation, you focus closely on the manager's daily working life. You understand what it is he finds tricky and the problems it causes him. From here you can acknowledge what he'd like to see change. You do this by asking what effect he wants to have on the situation. For example, he may answer "I'd like to keep my colleagues happy without compromising my authority." In this way you'll gain a clear view of the current difficult situation, the behavior in place before the training, what the current effect is and what the desired one will be.

In this diagnostic model, there's still one empty field. There's nothing in the box "behavior after the training" because participants' can't complete that



themselves. They have a problem but not the solution. The trainer's specialty is knowing how it can be different. Once you have experience of training for leadership, assertiveness or negations you will probably have an immediate idea of what this manager needs to learn. e.g.

- Show understanding of their colleague's wishes
- Look at why they are making the request and if there's another way to meet it
- Keep to the rules laid down by the company

What if you don't speak to any participants?

This example is based on talking to a participant who personally encounters difficult situations, but this often is not the situation you'll find yourself in. You may have clients wanting training for their colleagues or there's a ready-made reader they want you to work from. You can use the diagnostic model here as well. You ask your clients for concrete examples where their people struggle. Or you put yourself in their place and imagine what situations they would find difficult, what they would do and the effect that has. This once again puts their daily concerns as the starting out point and not what you already know.

Is training needed at all?

If you complete the diagnostic model, you can straightaway check if the question asked is a training issue.

- If there are no difficult situations, then you can't train. The client may say for example "The nurses need a refresher course in injections." When you ask further "when is that difficult" you want to hear answers such as "if the veins are deep" or "when a child is scared". If nothing is difficult then there's nothing to learn.
- If there is no problem with the current behavior then then you can't train. "They always do the injections well" "So, why do you want a training?" "Well, it's compulsory." If you accept the assignment, you will almost definitely have to deal with an unenthusiastic group.
- If there is no positive effect for the participants, then you can't motivate them to do things differently. "Participants need to learn to complete timesheets" "What does that achieve? "Well, nothing really. Management has decided that they must." This is more an assignment for management than a trainer. Where participants can't envision a positive outcome, but you can, then you can still train. With the "slide" (see step 3) you will allow them to discover what might be indeed of interest to them.

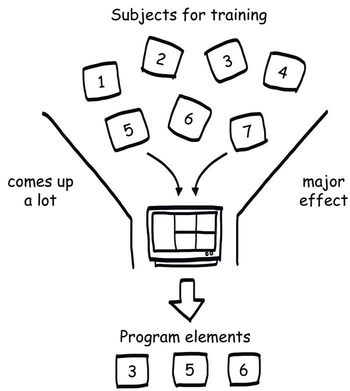
2. Choose your focus

Your diagnosis will show you what the participants still have to learn. Sometimes that's relatively straightforward and the focus for you training is instantly clear. Often, however, there are several issues at the same time and it is hard to choose what to focus on. You then run the risk of trying to fix everything and so fix nothing properly. Because if you try to address too many topics in too little time you can only deal with them at a surface level. How do you pick out what's really important?

Choose those things that matter

Not every element is equally important to the participants. You find out what the need the most through the answer to two questions.

1. What tricky situations come up the most?
2. What situations don't come up so often but have a major negative impact?



If you have a grip on these situations you almost always will be fine. The participants feel the training relates to their problems and doesn't have a lot of material that's not relevant to their situation. So, in a training about group processes I nearly always include the elements, "resistance at the start" and "tricky participants". These situations often arise. "Killing the leader" happens less often but it is really painful and can ruin your whole training. So, this also forms part of a training about group processes.

Psychological running order

Once you know what elements you want to deal with, you decide your program's running order. It makes sense to start with the part that handles your participants greatest "pain". Then they straightaway have the feeling that the training is about their issues. If you don't do that they become impatient. It's as though your doctor says, "I know you have appendicitis but let's first syringe your ears."

Often the participants and the trainer find different elements important. During a training for Project Management for example, you may find the starting phase crucial, but their greatest pain is at the point of delivery: that's where they have problems with unhappy clients. If you start at the point of delivery you will motivate the participants. In addition, you can make clear during that element how important the starting phase of a project is and bring up a new "pain". This is how you create a psychological running order which is not always a logical one.

Think about how you stimulate transfer

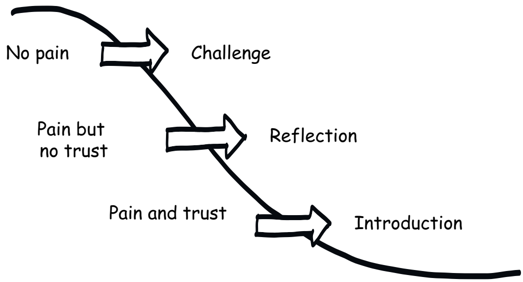
In this phase, you look at how and when the participants can apply what they learn in practice. This is the basis you use to determine how long the sessions should be. You should not try to handle more during a session than the participants can readily use the next day. So, don't make your trainings too full and don't plan the training days too close to each other. There has to be enough time between the days, so participants get the chance to apply what they've learned in practice and get some feedback.

Don't try to handle more during a session than the participants can readily use the next day.

3. Lure them into learning

So, there you stand with your new group. You've made introductions and shown them the program. But what now? How do you get the participants to really want to learn? If you start with your presentation straightaway you might not win them over. You do this by making them first feel "pain" and "trust". By "pain" I mean show them that in practice they're not being effective and that they suffer from this. By "trust" I mean convince them that the next topic will help them do better.

To allow participants to experience pain and give them trust, you use "the slide". That is a choice of three ways of working: challenge, reflection or introduction. Where participants don't experience pain and trust, you will need to make a greater effort to motivate them and so start higher up the slide.



Challenge

Where the participants are not bothered by anything then you must make them bothered. You do this by challenging them to deal effectively with a difficult situation. For example, you let them have a conversation with a difficult customer and ask afterwards if they were able to convince them. That may seem difficult and the pain makes them doubt their own approach. By stepping outside of their comfort zone, they become open to new points of view. If you subsequently give tips where they can improve and let then try again, they will come to trust that with this training, with this trainer, there is something to learn.

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Reflection

Sometime participants have pain but no trust. They have, for example, problems with aggressive customers, but don't believe they can have any influence on the situation. "The clients won't change." So, again, you start with a concrete situation. You lay out several options as to how they might react. The group enters into a discussion, tries out a few alternatives and discover that they do indeed have an influence on the client. This builds trust that they "can learn from this how to really engage the client".

Introduction

When participants recognize their pain, and have trust, then you only have to name the problem (the pain) to explain what it is they are going to learn. "Those board meetings are tricky, aren't they? You've prepared properly, but when it comes to it you are intimidated by their authoritarian manner. Before you know it, you're standing outside with nothing to show for it. During this training, we are going to practice how you can avoid this. I will show you how you can maintain a solid relationship, but still say 'whoa' in time." If the participants recognize this you'll get nodding heads and the feeling they are up for it and ready to get going.

The slide and the diagnostic model

While using the slide you should make full use of the difficult situations you've collected during the diagnosis. You use these as examples for either the challenging or the reflective start or you name them as examples during your introduction. In this way, you begin close to the participants daily practice and let them see what's in it for them.

4. Give them something to hold on to

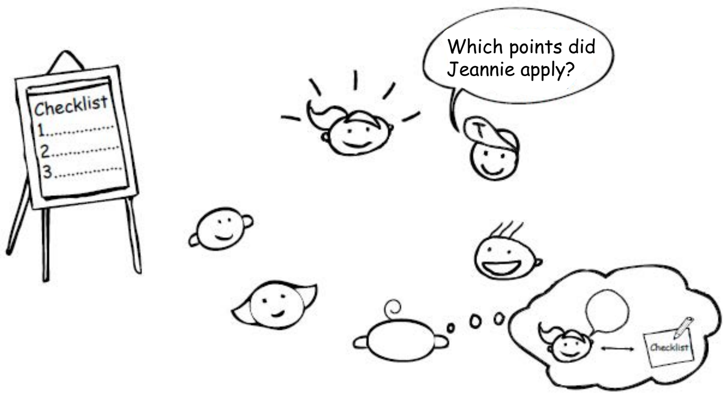
After the slide the participants will be curious about content. They will want to hear how you are going to help them with these difficult situations. This is the moment to show your expertise and explain what they are going to learn. Because most participants can't listen attentively for long, try to limit your explanation to twenty minutes at most. During this time, you should cover two things: the "how" for the new behavior and the "why".

- When it comes to the "how", clarify what exactly the new behavior is. What is it the participants have to do differently in their daily work? This is why you give them a concrete checklist that describes precisely what the revised behavior looks like. For instance, "the four steps for handling complaints" or "how to best use your vote".
- With the "why" you lay out what the theory is. You point out for example what happens with people when they have a serious complaint and that

it's useful to have some empathy with how they feel. Or you could explain what powers workers' councils have according to the law when it comes to employment conditions.

You need both "why" and "how"

To explain thing properly you need not only the "how" but also the "why". If the "why" is missing, the participants will find your story shallow. The checklist will be a random set of tips. Without a "why" participants will soon find your explanation too theoretical. Certainly, the more practical among them might think, "having empathy with the customer sounds all well and good, but what do I have to do to not "close up" if someone's screaming at me through the telephone?"



In fact, you often see that trainers take a lot of time to explain the "why" while the "how" remains either vague or implied. If you don't use a checklist, the training will lack focus. During exercises, participants won't apply their new expertise but will work based on common sense. The feedback will be all over the place and if you ask people what they will take away from the session everyone will say something else. Checklists help you and the participants to keep focus during exercises and enhance the training's learning outcomes.

How do you make a checklist?

So, if you can't have a successful training without a checklist, how do you make one? This also needs you to look at the diagnosis. What situations do the participants find difficult, what do they do in these situations, what effect does their behavior have and what effect do they want to achieve? This often tells you what new behavior is needed for the desired outcome (for example showing empathy for someone) and which model will be the most suitable (e.g. the one used for delivering bad news).

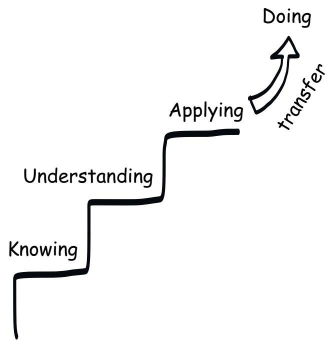
These communication models are often nonspecific and so not 100% targeted on your groups' situation. To make a useful checklist out of one of these you need to make your tips:

- Concrete. What should participants do to give the other person the feeling they are listening?
- Customized. Which steps do participants have trouble with and which do they find easier?
- Concise. Not more than seven points
- Connected. What connects the points and which ones belong together?

This results in a checklist that fits perfectly: it contains all the steps participants will need to approach a situation suitably. Think of a recipe in a cookbook, one intended for a new cook would explain how to blanch beans, for an experienced chef that would be redundant.

5. Let them practice step-by-step

After you have outlined the theory, the participants will practice what you've explained to them. They often find this more difficult than you might expect: what for you is a piece of cake ("go to phase two of delivering bad news") is mumbo-jumbo for the participants. To make sure you don't put too much on their plate, you need to build the exercise up in bite sized pieces. One useful guide is the "staircase" where you work your way up towards putting things into practice via four steps: from "knowing", via "understanding, "applying" to "doing".



Explanation: knowing

During this step you introduce the underlying model and the checklist: the why and the how. We covered these earlier.

Interim exercise: understanding

The second step on the staircase is that the participants get to understand what they've just learned. For example, they will understand how the element "dealing the blow" works when delivering bad news. What do you say, how do you do it, how will the other person react? Or in a Time Management course you let them see what planning a day well looks like by going through some examples. You work at this "I get it" step by giving short exercises where you apply parts of the new learning to simple practical examples.

Core exercises: applying

During this step participants practice their new expertise and skills: breaking bad news, carrying out cardiac massage on a dummy, planning their day themselves. That's why this step is the core of each topic. During these core exercises the participants work with real cases, where they can demonstrate their new behavior. For this you should use situations identified during the diagnosis phase or you ask for individuals' own cases during the training. If you work with fictional cases during the core exercises phase, the training remains superficial.

Field assignment: doing

There are only a few participants who will use their new knowledge and skills in their daily practices on their own initiative. Practical exercises will give them the "push" they need. Have they learnt how to deliver bad news? Then give them the assignment of giving three such conversations at work and reflect on them using the checklist. They can mail their findings to you and you give them feedback.

Too little challenge is dull, too much criticism is demotivating.

When having participants practice, the art is to challenge all of them so they go through these steps without them disengaging. Too little challenge is dull, too much criticism is demotivating. You figure out the right type or quantity of feedback by looking for the "zone of proximal development": what have they already mastered and what's their next step. So, you don't only focus on your program (checklist, exercises), but also on what the participants are doing. In subgroups, you can observe for yourself how it's going. In session reviews, you can find out from the participants what worked and what was tricky. In longer projects, you can work with intermediate assignments and give participants your feedback based on what you see. During any one, or indeed all of, these moments you can reinforce the learning process by giving feedback: what is going well, what could be better.

Using the "success spiral" to guide role plays

In many communication trainings, the core exercise is a role play: dealing with an angry client, negotiating with a boss, breaking bad news. This way of working lets you focus on working at the "zone of proximal development" for the practitioner.

Because you use a difficult situation from their own experience, there's a real chance they will fall into the same pitfalls they do in real life. That's great. Once the pitfall becomes visible, you can stop and refer to the checklist to identify which behaviors they haven't used. Then add a related tip and have them try again, until it goes the way it should. Once it works, that's when you see success. By using this way of working participants learn a great deal, safely and very quickly.

6. Keep them safe

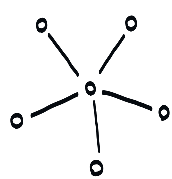
Group learning can be challenging. Participants will only dare to experiment with new behaviors if they feel safe. If you train using the slide and the stairs a major part of this will happen by itself: you let the participants see what they have to gain and you ensure with all sorts of exercises that they will work in groups. However, there are still obstacles that can appear during the group process: initial resistance, one participant who is not on board, an informal leader. You deal with these disturbances by developing authority and creating intimacy. You make sure the participants can trust you (developing authority) and that they are comfortable with each other (building intimacy). You stress different thing depending upon where you are in the group process.

Phase 1: The start of the training

At the beginning of the training it is important that everyone feels they are in good hands. You achieve this by being open to your candidates, show your "professional love" and demonstrating interest in their experiences and stories. Possible obstacles include:

- A participant unaware of their learning needs. "I'm only here because my boss says I have to be." Show understanding of their position ("that can't be easy for you") and keep an eye on whether they will, after all, learn something. Talk to the participant during the pause to see

Phase 1: connect with each participant

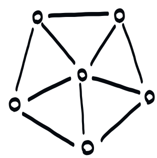


if there are nevertheless issues they would like to be able to handle better.

- An attack on your authority. Not every participant will have the same norms and values as you do. One might ask if the session could stop earlier because of traffic, another leaves their mobile phone on the table. Here too, stay respectful but stand up for your program and your values. In this way, you will show the authority needed for the participants to learn safely.

Phase 2: Gaining momentum

Phase 2: let the group learn from each other

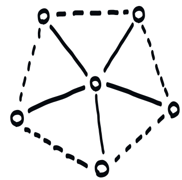


During the training participants work in subgroups. For this the trainer's authority should diminish and the participants should want to learn with and from each other. Obstacles in this phase are:

- Black Sheep. Every group can have someone who irritates other group members and gets shut out. That's hurtful for the "black sheep" and creates an unsafe atmosphere. ("You have to watch what you say here.") You avoid this as a trainer by treating everyone in open sessions with respect and guiding those participants with inappropriate behavior in private conversations.
- Poor contact with the group. Sometimes you get the feeling that you are losing your connection with the group. Working harder at it doesn't help. What does help is confronting the situation and asking how the training is going. That way you can address any underlying criticisms and agree how to proceed.
- Informal leaders. Sometimes a participant is clearly "the top of the class". That seems to be an enviable position to be in, but it isn't. Informal leaders can't learn anything themselves and over the course of time this situation can lead to resistance from the rest of the group. You can help everyone by, together with the top of the class, looking at what situations they find stressful and sharing that with the group. In that way, they can get back to learning.

Phase 3: Finishing up the training

Phase 3: take charge again



Towards the end of a training participants often already have one foot out of the door, heading for work. They think more about what's coming up and less about each other. To keep the groups process on track, you as trainer need to take the lead again. Some final hurdles are:

- A training that just goes out like a candle. Sometime the candidate's thoughts are so far away that the training just dies out. You can avoid this by making sure that you have a section at the end of the program which is just as engaging as the very first one.
- A negative evaluation. At the end of each training you have to evaluate, and you have to respond not only to compliments but also criticism. That can be hard. Keep asking until you know what's bothering the group and apologize, if necessary, so you can make a "clean" finish to the session.

7. Give some professional love

Training is a complicated craft. You must keep an eye on a thousand and one things and that only works if you're comfortable in front of the group; if you have the feeling that you're working with and not against each other. It really helps if you can like the group, a feeling I call "giving some professional love". By this I mean choosing the participants side, sympathizing with them and making them welcome.

Often this is straightforward, but with some participants you have to make an effort to put your professional love to work. If someone makes it obvious that they don't want to be there, or just pushes your buttons, it's hard to like them. There are a few steps you can take to show you professional love.

Being open

The first step towards liking your participants is simply to be open for it. If you are predominantly busy with your program, or later on during the program realizing how really tired you are, of course you're going to find a participant's "yes, but" irritating. Be ready for this, act as if it's a party where you're the host and expect to like everyone who's there.

Say "yes" to the "no"!

Sometimes you have difficult participants, someone who's not in the mood, who goes their own way, someone who replies to feedback with "yes, but". The knack is to say "yes" to the "no". So, be curious, keep asking, try to understand what it's like for them. Once you get their story you will almost always like them better. They will feel that and be more receptive to your reactions. That's how to change a "no" to a "yes".

Dare to call them out

If you can't get the awkward behavior under control with the first two stages, take the participant to one side. Tell them what's bothering you and be curious about why they act the way they do. If you do this from a position of being an equal that will deliver a better contact and the participant will try to adjust their behavior.

If the love won't come

If you apply these tips, you'll be at ease in front of a group. You'll find them the best group you've ever had and each and every one of them will have a special place in your heart. But sometimes that just doesn't work out. No matter what you do, there's the one participant you'd take a swing at, you're scared of the group and you can't wait for Five O'clock so you can all go home.

These moments are upsetting, but they are part of the deal. Every trainer has their weak spots and if they are aggravated, it's difficult to react in a professional manner. This makes you step out of your role and react based on your weaknesess, irritations and fears. It helps to discuss this with colleagues or work together. Then you can discover if, and when, you are overreacting and talk about how to get back into your trainer's role.

Karin de Galan

Karin de Galan (1967) is a much sought-after trainer and popular writer. Her training programs each year are completely booked and her books have sold over 60,000 copies in the Netherlands alone. Her training agency, de galan school voor training, is the market leader in the Netherlands in the field of education and training for trainers.