

How to Become a Successful Freelance Trainer

Sandy Leong



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The advertisement features a black header with the CMO Inspired Conference logo on the left, which consists of a green speech bubble containing the letters 'CMO' in white, followed by the text 'INSPIRED CONFERENCE' in white. Below this, the date and location are listed: '25 OCTOBER | DE VERE BEAUMONT ESTATE | OLD WINDSOR UK'. The main body of the ad is a collage of images: the top half shows a large, white, multi-story building with many windows, surrounded by green trees and a garden with a fountain; the bottom half is a horizontal strip of four smaller images showing conference activities: a panel discussion with four people on a stage, a woman speaking into a microphone, a large audience seated in a hall, and a man presenting at a screen.

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ABOUT THE AUTHOR

Sandy Leong is Director and Head of Training at MyTrainingResources, a training company, providing training, training materials and consultancy to a wide variety of different organisations.

She set up this training company over 25 years ago. Sandy and the training team run Management Development, Personal Development and Training for Trainers across the UK and further afield, working for many different organisations.

Sandy is also a professional speaker, speaking on confidence building and motivation. She is Immediate Past President of Loughborough Speakers Club; and also works as a Guest Speaker for various Cruise Lines. She is Chair of the Board of Trustees of a large charity.

INTRODUCTION

Hello, and welcome to 'How to Become a Successful Freelance Trainer.'

I have been running a training business and working as a trainer for over 25 years and have lost count of the number of participants on the 1000's training courses that I have run, that have come up to me and asked the question, 'I would like to get into training, how should I go about it?'

I have always tried to give them some ideas of how to start but in the very limited amount of time available it is impossible to give enough information to be really helpful.

I have decided to put my experience of setting myself up as a trainer and working successfully for over 25 years into this book. I hope it will be useful for you in your exciting journey into the world of freelance trainers.

1 BREAKING INTO THE WORLD OF FREELANCE TRAINING

There is always a reason why people do something or decide to set on a course of action. If you are reading this book you are probably thinking about trying to break into the world of freelance training.

What is it that is driving you in this direction? Do you want to take control of your life by working for yourself and getting rid of your boss? Have you been made redundant and are finding it difficult to get a permanent job that will suit your skills? Or would you really like to get into training in an organisation or a company but see freelance training as an answer to bringing in some income until you can achieve this? Maybe you want or maybe need to work flexible hours and see having your own business as the answer to this?

These are all typical reasons for wanting to set up as a freelance trainer. I started on this journey over 25 years ago driven by a need to be more in control of my time. I had three small children at the time and a more than full time job as Chief Officer of a Racial Equality Council. A full time job with lots of evening commitments. I would race home, throw dinner on the table, shout out a few orders that usually involved homework, PE kit and lunchboxes and dash out again to attend an evening meeting; and I had been juggling school holidays and other child related activities for years.

One night as I parked my car on the drive of my house, after a long and difficult day I had that moment of realisation! The realisation that something had to change and I had to make it change. I needed to either find a different job or a different way of doing things.

I am a trained teacher, so I could fall back on those skills but I didn't really want to go back into teaching in a school. My job before my present role had been as a Training and Development Officer, where I had developed training programmes and been involved in some of the delivery.

I started to examine my skill base and my options. I had had contact with many trainers during the time I had worked in my previous post and had a lot of connections as I had been asked to run a lot of workshops at conferences and deliver presentations, in fact I quite missed all that in my present job.

The idea came to me. I would try and earn my living as a freelance trainer. Eureka, I'd got it! But where to start? I did a lot of things the hard way in those days, but I was successful, so I am going to share my knowledge and experience to make it an easier journey for you.

On with my story. I began to talk to my old contacts in the training world, asking them what training subjects organisations were engaging trainers to deliver and to some I knew better what the daily rates were these days and what their lead time was for commissioning training.

Then about a month later in a brave or maybe foolish move I handed in my notice. Now I had one month to get this sorted. It wasn't as if we could afford for me not to be bringing in an income. However I had spent the previous month doing some research and coming up with a bit of a loose plan.

But I wasn't being as reckless as it appears. I do have a teaching qualification and I thought I would have the option of doing some supply teaching whilst I was waiting for my business to take off. One of the first things I did was to register with several schools in the area as a supply teacher. This is also motivational because anyone who has done supply teaching knows that it can be a difficult way to earn a day's pay. Avoiding having to do any would motivate me to get my training business going. I did have to do some supply teaching to begin with but not too much before I got some training work coming in.

I set up my office in the house. I was fortunate, at that time we lived in a large, old Victorian house so I was able to take one of the smaller bedrooms as an office. I got an old desk that one of the children had finished with out of storage (we had bought them a better one). I cleared out a bookshelf for my use and put all the usual stationery items that are needed and my diary, (empty diary!) on the desk and I was ready to go. I just needed some work now!

The first day of my new life came. It seemed to have come very quickly. I took the children to school and then came back to a quiet and empty house, made myself a cup of coffee and went to sit at my desk, wondering what on earth I had done, and why just over 2 months earlier this had seemed like a good idea. No work colleagues to talk to about the weekend, no one to joke with, no one to throw around ideas with. Just me and my desk and a telephone that wasn't ringing. In fact it didn't ring all day on that first Monday. Just me in a silent house with an empty diary.

That was a scary day. However when I went to collect the children from school, having made some phone calls and started working on the plan that I had drawn up I knew I had made the right decision. Although over the next few weeks I didn't always manage to keep that thought in my head.

What I did realise is that you have to be very self-motivated and very, very self-disciplined to succeed. You can't be half hearted about setting yourself up as a freelance trainer.

Procrastination isn't an option, you may need to work all hours in the day and then a few more to get started. When you are earning only when you are delivering training then taking too long to get the business going will hit you hard in the pocket.

The good things are that you can work them when you want, to a certain extent. You can pop out to see the school production or get some shopping if it's urgent. Although a lot of the time you will be working to other people's deadlines once you have bookings to deliver training courses.

But you will be able to control your diary to a certain extent, if like me school holidays were an issue then I would try and book less training during the holiday times and use this period for working on new developments and administration. Actually this is often possible because organisations book less training during peak holiday periods as they will have staff off work taking their holidays.

But you do have to go where the work is and deliver the training when the organisation wants it. If you can't do it then they will go and find someone who can and you may have lost that work forever.

It is useful to think about your personality for setting yourself up as a freelance trainer because you need to decide if you have got what it takes to be able to work in this way. Are you the type of person who can work on your own, is self-motivated and able to work normal office hours, and often more, when there is nobody checking on you and nobody who is going to be cross or disappointed when you haven't achieved things.

If you need a group of people around you to motivate you or you need someone to wave a stick at you to get you moving then there is no point in reading the rest of this book. Working as a freelance trainer is not for you. However if you are thinking, yes, I could work on my own, I could be responsible for my own achievements then please carry on. This book will help you achieve your goals.

That was my story. I did succeed and am still working in my business over 25 years later. Mine has been and continues to be a success story and I'm sure yours will be.

Next let's blow the myths about working for yourself as a freelance trainer. The first one is that you can earn a lot of money in this industry. Yes, you can make a very good income for each day you are delivering training, but you only earn money from the days that you are actually booked to deliver. The meetings you have to have first with training managers or managers isn't usually paid. The time it takes you to write a course isn't usually paid for, unless the organisation wants to keep it and have their copyright on it. If you take out the time you will spend marketing, selling and preparing this means you won't be delivering training 5 days a week through the year. You also won't get paid for your holidays and public holidays and taking time off sick isn't an option.

The second myth is that you will be your own boss. Well that is true to a certain extent. But every training contract you pick up you will be working to a boss. You might have several bosses at the same time. These bosses can be unforgiving and frankly uncaring. You have been hired for a specific piece of work that they expect to be delivered to certain standards, if you aren't up to it they will get rid of you. They have no actual commitment to you. If you don't perform well they will move on to the next freelance trainer. There is usually someone waiting to take your place. This means you have to be amenable to these bosses and very sensitive to keeping them happy probably more than the ones you have had before when you were an employee in an organisation.

Myth three is that you will be able to choose to work exactly when you want to. There is a little bit of truth in that but often you have to book training into your diary when the client wants it, not when you want to do it. You will often be chasing unreasonable deadlines and putting a course together at the last minute because the client didn't get round to sending you the training objectives earlier. Or having to do three consecutive days each at different ends of the country because that was when and where each client wanted the training delivering.

Still up for it? Spare a few moments to reflect on these questions before you go any further. Are you really able to work on your own or do you find it difficult and need a team around you? If you really want to work with people you know, in a team environment, then you will struggle to be a freelance trainer. You will be working on your own for a lot of the time, chasing work and writing training materials.

When you are with people, running a training course you won't know them, you will nearly always be working with a bunch of strangers. It can be a lonely life added to by numerous nights on your own in a hotel, eating dinner and breakfast by yourself.

But if you are a self-starter and enjoy your own company then this can be the life for you. There will be nobody to tell you what you can or can't develop; no one watching the time you arrive and leave work. Nobody you have to run an idea by and get approval for it before you can start to work on it when you are developing and growing your business.

You will meet loads of interesting people and learn from them whilst delivering training courses. You will get to work in many different organisations and see how they work and pick up new ideas. You might even see some of the world. I certainly have and have been to places that I would never have been to if I hadn't been asked to deliver some training there.

I started from almost zero, with just a few old contacts that I was able to talk to and I've had a great time working as a freelance trainer. Be clear what your motives are for starting on this path, make sure they are the type that will help you get to where you want to get to.

In this book I will share my 25+ years of experience in setting up a training business, with some information that all trainers need to develop their skills and become a really good trainer.

2 GETTING STARTED

If you are still reading this book it is safe to assume that you have decided that this is the world that you want to get into and that you will enjoy the challenges. The first thing you need to do is make a plan. This should avoid you sitting at your desk wondering what you should be doing and because you can't decide making yet another cup of coffee whilst you think about it. Time is money and whilst you are sitting at your desk you aren't earning any.

The first question to answer is, 'Why are you starting this training business?' Is it to be more in control of your life or have a bit more free time; a hope to see the world; or a passion for developing others? Whatever it is write it down.

The next question to think about is, am I going to go it alone or work with a partner or a small group of people? If it is the latter, will it be as a cooperative venture or will you be the boss and they will be working for you? The answer to this question will determine the structure of the business and what you think you will be able to achieve.

Another question that is a very important one. What will you offer as your specialist area of training? You need to give yourself and your new business a focus for finding work and developing materials. It is a waste of time approaching organisations to talk about training generally. Firstly it would be unlikely that the training manager would see you and secondly you need to be viewed as having a certain amount of expertise in a given area and a track record of either managing this sort of work and having the ability to deliver training sessions or of delivering training on this subject area.

Even if you think you could turn your hand to most types of training delivery it is unlikely that a training manager will think so. Maybe later as you develop a relationship with those who commission training from you they will ask you if you could deliver training on a wider area of subjects.

Think about what you have done in the past, what you know well and what your past achievements are, because you need to get yourself out there and sell yourself on past experience and expertise.

One of the first things to decide is what your niche is going to be. It's a good idea to research what other trainers and training companies are offering. Maybe you can find a gap in the market however in my experience training can be a crowded marketplace with very few gaps in it.

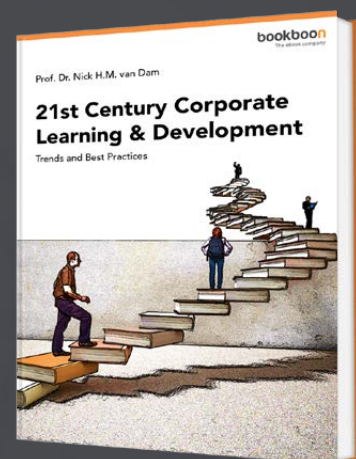
Research what others are offering, by talking to contacts, attending networking events and listening to what people are saying about how they want to develop their staff and grow their businesses. Find out what challenges organisations are currently facing; what current legislation is forcing businesses to do and what is on the current agenda where you live and nationally.

If anything that you hear matches your areas of expertise then you can begin to develop your training profile against these subject areas. You might not be able to find a niche that isn't being covered by others and that isn't a problem. If people are offering a certain type of training courses it is often because there is a need. If you think of something that others aren't offering it could be that they aren't offering it because there isn't a need for it.

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Once you have decided what subject area you are going to offer training in, then the next question is, who are you going to approach? In any situation like this it is always best to start with those you know. Cold calling organisations or sending out emails to advertise your services isn't likely to be very successful.

Make a list of everybody you know, family and friends, social acquaintances and previous colleagues and anybody that you have done business with before. Once you have your list find an excuse or reason to call them and in some cases meet up with them. Basically you want to tell them what you are going to be doing and what you will be offering and ask them if it could help them. Pick their brains to find out any contacts or ideas that they might have that will help you to get work. It may cost you a cup of coffee but it could be worth it.

One way to get into an organisation is to offer to do something useful and valuable like delivering some training, for free. This is a good way of getting testimonials and gives you the opportunity to drop it into future conversations when you are trying to get work. It will mean you will be able to say, that you have delivered training for 'X' organisation. You have no need to say that you did it for free, but you can say, 'I've run a 'X' training programme for 'X' organisation.

Organisations hire freelance trainers whom they believe will be able to deliver and evidence of past experience will tell them that you are capable. Often training managers are hiring a freelance trainer to make life easier for themselves. They want someone whom they are certain will deliver the training to the standard that they require.

By thinking about these questions and answering them you are beginning to form the basis for the next few years of your working life. It doesn't mean that you can't change your mind about things but you do need a starting point and a clear direction. Even though this plan to begin your business isn't being set in a tablet of stone try and begin with the end in mind. You might change the end later because of other influences. But for now think about what you are setting up.

Next, the very important question that you need to consider. How much do you want to earn, or how much do you have to earn? You may have been made redundant and so have a cash sum which you can live on for a while, which gives you a breathing space. Maybe you are not working now and see setting up a training business as a way of adding to the family's finances; or you may be working and intend to give up your job to do something that you really want to do.

Whatever your current situation is you need to do some financial planning. Getting into training can mean having some long lead in times from actually getting the work to delivering it, to getting paid. Typically some organisations book 3–6 months in advance and some a year in advance. You need to think about your cash flow during both the setting up of the business and when it gets going.

Work out how much you need to earn each month to just get by. Add up all your outgoings, mortgage/rent, utility bills, car expenses and transport costs, food and anything else you have to pay out. Then times this by 12 and you have what you need just to exist for a year. You might want to add to this things like buying birthday presents and a bit more in case something breaks down and some for any tax you will have to pay.

You also have to work out how much you can charge per training day delivered. It is quite usual to charge only for the days you are delivering. Organisations are very rarely interested in paying you to design the training course, unless it is very bespoke and they want the course as theirs with their copyright on it. Then you might be able to charge for the design. However this is usually charged out at much less than the daily training rate, often below half.

It is quite usual to claim travelling and hotel expenses and subsistence if you are staying away overnight. That is usually dinner and breakfast, normally organisations have a ceiling on the amount you can claim, so invariably it is a budget hotel!

Sometimes it can be difficult to find out what the daily rate is for training and organisations will ask you to put in a quote. This is more likely to be if they have asked several trainers to put in a proposal for the work. Other times they will tell you what they will pay. This is where your networking skills come in before you get started to try and find out what the normal rate is in your subject area and in the organisations that you will be targeting.

The maths then become reasonably easy. Firstly how long can you live without any income using savings or a redundancy payment. You will need to give yourself a 6 months buffer if you have no other income coming in over this period.

Then work out how many training delivery days you would have to book in per month to fund your monthly living expenses. And remember that especially in the beginning most training delivery requires the equivalent days' time in preparation. This is writing the course / tweaking an existing course, designing the powerpoint presentation, writing appropriate case studies / exercises and then the photocopying and collating of the resources.

Also be mindful of your cash flow. You will often have to wait some weeks to get paid. Many organisations only do one payment run each month and if your invoice misses this run you will have to wait until the next month. You will get paid for any travelling you do, either mileage or public transport plus any hotel bills but you will have had to pay these out first before you get them back when your invoice for the training and expenses is paid.

Now that you have thought about all those questions can you write a simple sentence about what you are setting up, for example, are you setting up as an individual, working for certain types of organisations delivering a certain type of training courses earning x amount per year? If you can write a sentence like that it will give you some clarity to start working on your business. Write it down, as briefly as possible, what you are going to develop and then put together a brief action plan of what you need to do before you read any more.

3 CREATING YOUR WORKING SPACE

One of the great things about setting yourself up as a freelance trainer is that there isn't a big outlay and you don't need much space to work in.

However it is important to create a working space. No doubt you will be starting in your house and the kitchen or dining table is as good as anywhere to work, if you haven't got anywhere where you could squeeze in a desk.

If you do have to work on the kitchen or dining table then it is best to purchase a couple of baskets, A4 size, that you can put your work into when you have to clear it away to use the table for other things, creating a sort of mobile office.

But if you can find some space in the house, a spare bedroom maybe or a spare corner in the dining room it is beneficial to be able to walk away from what you are working on. Working for yourself can be all consuming and you will need to forget about it sometimes, just to keep your sanity.

In terms of equipment you will need very little to run your business; a laptop and printer, a mobile phone, a good internet connection is enough to start with. If you have these already then you have a head start.

If you are going out to buy them then consider buying a laptop that is small enough to make it easily portable, but has a screen big enough to be comfortable to work on for long periods of time.

Buy a printer that has a scanner built in. This is particularly useful for returning signed contracts when the work starts coming in.

A mobile phone is a must, as you will need to be able to return calls and emails when you are out on the road. Unfortunately it means that you are never off duty but this is something you have to put up with. Training managers want a quick response. Often they are booking you to make their life easier and the work will go to those who respond to requests efficiently and timely.

A binding machine is a useful addition to your trainer's office kit. They aren't expensive and make any workbooks you produce for participants look professional. The same with a laminating machine, it can make any workbooks look professional and also be used to laminate some exercises so you can use them more than once. Saves paper, saves ink and possibly helps save the planet.

If you can find some space in your house then furnish it with a desk with some drawers and a comfortable chair as you will be spending long days selling, planning and preparing your training courses, sitting on it. And talking to potential customers and at times waiting for inspiration.

A filing cabinet is perhaps a luxury to begin with or maybe if you file everything on your computer it's not necessary. However you will have paper handouts and exercises left over from a training course, invoices, details of training, powerpoints and the notes you have been using to deliver a course. Being paperless is difficult when you are in the training business. A set of drawers or a desk with some drawers in it will do the job of keeping these organised.

And if space permits a bookcase for your source books, for workbooks from different courses, for your file of invoices and other stuff that needs a home.

Try and make your space comfortable and somewhere you are happy to be. You will spend a lot of time there. It needs to be business like, you are going to have to generate your income from this place. If you possibly can try and make your office in a separate room, so you can walk away and shut the door. Working for yourself has no open and closed time. The benefit is that you can work when you want however the downside is that it can be difficult to switch off. This isn't good for your stress levels as you will need to be able to relax.

If you can't have a room just for your office then try and avoid putting your desk in a corner of your bedroom or the lounge. You will be looking at what you haven't done and still have to do when you are trying to relax. The dining room or kitchen or in the hallway, if it is big enough is a better choice. Any room where you do a particular activity in, like a dining room where you eat and then usually move into the lounge is the best choice, avoid a place where you would sit and relax, or go to sleep. The bedroom is probably the worst place you can create your working environment.

4 CHOOSING YOUR BUSINESS STRUCTURE

In Chapter 2 I asked you to decide exactly what business you were setting up and if you were intending to work alone or with someone else or with a group of people. What your answers were to this question will determine how you are going to set up your business.

Are you going to go it alone as a sole trader? This is less complicated option all round. Or are you going to set up a partnership or set up a limited company?

You must choose a structure for your business. This structure will define your legal responsibilities which are the paperwork you must fill in to get started and the taxes you'll have to manage and pay. It will also determine how you can personally take the profit from your business and your personal responsibilities if your business makes a loss. You can change your business structure after you've started up if you find that a different structure would suit you better.

In the UK the three main types of business structures are, a sole trader, a limited company or a business partnership.

The simplest option is to start your business as a sole trader. Actually when you start working for yourself, you will be classed as a self-employed sole trader unless you choose one of the other options. This applies even if you haven't told the HM Revenue and Customs (HMRC). As a sole trader, you run your own business as an individual. You can keep all your business's profits after you've paid tax on them. You can employ staff in this model. The term 'Sole Trader' means you're responsible for the business, not that you have to work alone. You will also be personally responsible for any losses your business makes.

You can use your own name or trade under a business name.

But your name must be unique – it can't be the 'same as' or 'too like' an existing name. You must include your own name and business name (if you have one) on any official paperwork, like invoices and letters.

When you are running a business as a sole trader you have to keep records of your business' sales and expenses and send a Self-Assessment tax return every year to the HMRC. You have to pay income tax on the profits your business makes and you must pay a National Insurance contribution. You must also register for VAT (Valued Added Tax) if you expect your takings to be more than £83,000 a year (at time of writing). However the latter is something that you need not worry about when you are first starting up. You can always register for VAT at a later stage. Training has few consumables which means that there is little advantage to being VAT registered which enables you to claim back any VAT on what you have had to buy for the business.

Another option is setting up a Limited Company. A Limited Company is an organisation that you can set up to run your business. It's responsible in its own right for everything it does and its finances are separate to your personal finances. Any profit it makes is owned by the company, after it pays Corporation Tax. The company can then share its profits between the Directors.

Every Limited Company has 'members', that is the people or organisations who own shares in the company. The Directors are responsible for running the company. Directors often own shares, but they don't have to. If you are setting up a limited company then you will be the director.

There are many legal responsibilities involved with being a director and running a limited company, many more than being a sole trader. As a director of a limited company, you must try to make the company a success, using your skills, experience and judgment. You have to follow the company's rules, shown in its articles of association, which are the working document of the company. You will have to make decisions for the benefit of the company, not yourself and tell other shareholders if you might personally benefit from a transaction the company makes. You have to keep company records and report changes to Companies House and HM Revenue and Customs (HMRC).

You also have to make sure the company's accounts are a 'true and fair view' of the business' finances and file your accounts with Companies House and your Company Tax Return with HMRC and pay Corporation Tax.

In addition you must register for Self-Assessment and submit a personal Self-Assessment tax return every year. You can hire other people to manage some of these things day-to-day (e.g. an accountant) but you're still legally responsible for your company's records, accounts and performance.

In a business partnership, you and your business partner (or partners) personally share responsibility for your business and you can share all your business's profits between the partners. Each partner will pay tax on their share of the profits.

Partnerships in Scotland (known as 'firms') are different, and have a 'legal personality' separate from the individual partners.

The legal responsibilities in a partnership are that you are personally responsible for your share of any losses your business makes and the bills for things you buy for your business, like stock or equipment.

You must choose a name for your partnership and register it with HM Revenue and Customs (HMRC).

In the UK your tax responsibilities are that the nominated partner must send a partnership Self-Assessment tax return every year. Also each partner must send a personal Self-Assessment tax return every year, pay Income Tax on their share of the partnership's profits and pay National Insurance. As with the other business identities the partnership will also have to register for VAT currently if you expect its takings to be more than £83,000 a year (at time of writing).

Whichever business model you decide you will have to keep records of all your business related income and expenditure. Before you have even earned anything it is wise to set up a simple accounting system. You can use a spreadsheet to keep a record of all your income and all your expenditure. You must keep all the receipts from your purchases so they can be matched against your expenditure. You also need to set up a separate account with the bank for your business.

This type of business has very few overheads, unless you decide to rent a premises. At the beginning of your business this isn't either advisable or necessary. Working from home is cheap and if you do need to meet clients then you can arrange to meet them at their premises or at a local café.

If you have no rent and utilities bills to pay the overheads of your business will be very low. There will be your start-up costs of capital expenditure such as purchasing a laptop, printer, maybe a binding machine and laminating machine and maybe a powerpoint projector. (But not usually necessary unless you are going to be organising your own training courses as most organisations supply all the technology for delivery.)

Ongoing expenses are internet connection/telephone. Website hosting fees. A mobile phone which you no doubt have already and the monthly bills can go through ongoing expenses. The consumables are usually only paper, ink and source materials and petrol for your car to get you to training venues.

An important consideration is deciding what name you are going to trade under. It is important to give this a considerable amount of thought. Once you have named your business it becomes real.

You can call your business almost anything you want. But do check out what you are not able to call it even as a sole trader. You can check this out on the internet. If you are setting up a limited company then you have to check what names are available.

The other issue that can influence your choice of a name for your business is your website address. Once you have come up with some ideas for your business name, you need to do a search and see if any of the domain names are available that are the same or very close to your business name, if not it is best to think again.

You can use your name and maybe add training to the end of it. John Jones Training. This works best if you have a name that has a bit of a ring to it. Or you can name it something completely off the wall like Wild Purple Training.

If you are forming a partnership or involving more than yourself in the business you can use something that indicates this like John Jones Associates.

But whatever you call your new business remember people searching for a training company on the internet, may be putting in keywords like 'training', 'management training'. If they are looking for a training company it is unlikely they will type 'Purple' or 'Wild' in the search bar.

So choose your business name with caution. Think of something that is easy to remember, makes a good website address, looks good on business cards and other marketing materials and trips easily off people's tongues.

5 WRITING YOUR BUSINESS PLAN

It may seem a bit over the top to write a business plan if you are only going to be doing some training but the process of writing all your thoughts down will help you clarify what you need to be doing and when you should be doing it and importantly what you are trying to achieve.

A business plan should be a comprehensive explanation about your business and what you intend to achieve and how you will do this. The first section to consider is the company description, the detail of what you have set up, include your business structure and the type of training you will be offering and to whom. Also what the capabilities and the resources you have, that is will you be working alone or with others. You need to describe the sector you are going to work and the companies or organisations are you hoping to get work from and details about these intended customers and the products or services you will offer them.



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The next thing you should be looking at is the business environment that you are in. This is a really useful exercise to do before you start your business. This is about doing your research and finding out about the competition. Who's doing the same type of training as you are going to offer, who's doing things that are slightly different but are similar? Who's doing things locally, if you are hoping to work locally and who is doing things on a national or international stage?

Also include what the current trends are in training. Are there any bits of legislation that have just come out that people are going to need training on? Is there new technology out there or new marketing techniques that people are wanting to know about? Even in training areas like management development and personal development things go in cycles, sometimes management training is the flavour of the month, sometimes it's time management that everybody wants and sometimes it will be assertiveness training. You need to use your networking skills to find out about what is the current trend. Is it coaching, is it management development? It could be anything, but whatever it is you need to know about it.

Your research will hopefully have enabled you to find out about the market place you are trying to get into and what your customers are buying or your potential customers are buying from other trainers.

The next area to look at is your business strategy. This is really important when you are beginning to get a business up and running. You need to map out the strategies for how you will develop your business. Will you grow your business to get it big enough to give you, not only the income you need but also the income you want? This section is about how you are going to grow your business and includes listing your business goals.

Another section to consider is your marketing plans. What marketing are you going to do to achieve what you want to achieve and how will you do it? By email, social media or networking? And also what are your timescales? Who are you going to approach, and what training courses are you going to offer them?

The next really important section of your business plan is the financial side. This is looking at where you are at today and how much money you have got in the bank. How long can you sustain yourself without bringing in any more money and where you want to be in the future? How much are you hoping to bring in by training every month?

If you are working in another job at the same time then of course you've got some income coming in but you have got less time to develop your business. So you need to start putting some figures down on paper looking at it on a month by month basis of how much you need to bring in, and forecasting when you might start to achieve this, and of course looking at how much you would have liked to have earned by the end of the first year.

A business plan is a really useful tool for thinking all of these things through. Initially you should look at it to cover a year but there is no harm in trying to project into year 2 and year 3. Hopefully your business will take off and year 2 and 3 projections will need changing, hopefully by adding to them.

But of course although it is a very useful exercise to have all this written down on paper you need to know how you are going to achieve it and so on the back of your business plan you need to draw up an action plan.

The best way to do this is get some sheets of paper or a large 'page a day' diary, or if you are using a computer you can do it on a spreadsheet. Label each piece of paper or spreadsheet with a month of the year. Divide the month into the weeks and then write an action into each of those weeks to develop the ideas of what you are going to do, but the first thing before you put the detail in, right at the top of your piece of paper, or your file on the computer, write in what your goal is for that month. That is writing a smaller goal from your main goal of setting up a training company.

Is it to contact training companies, is it to write x amount of training programmes, is it to research what people need in training terms? Once you have decided on your monthly goal divide this up into the tasks you have to do to achieve this. Allocate the actions that you are going to do throughout the days in the month. This makes it so much easier to achieve what you need to achieve because when you are working on your own sometimes you can lose direction.

When you have done all this preparation you can go into your office on a Monday morning, you can get out the sheet for that week and look at all the actions you have to take and start working on them straight away. You can have that great sense of achievement in ticking each one off when you have completed it.

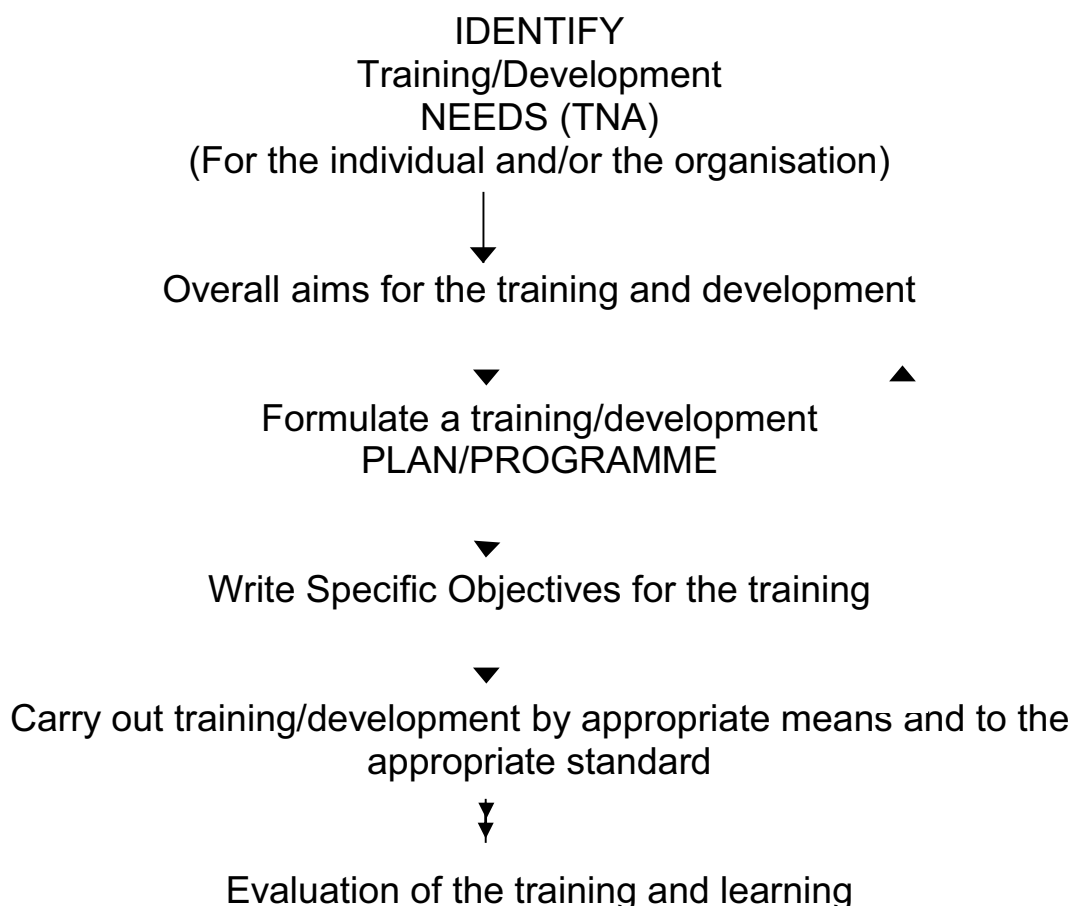
Of course you can add to these as you are going through the weeks with new ideas and new contacts but at least if you have the bare bones of an action plan you will know what you are intending to achieve on a weekly and monthly basis.

6 KNOWING YOUR STUFF

Now you have your plan for how you are going to start your business of freelance training you will need to start to write some training courses. To do this you need to really understand the theories behind how people learn because your training should enable your participants to come away from your training courses knowing more than when they came into the room earlier that day. If you want to succeed as a freelance trainer you have to develop a reputation of a least being good but better still of being excellent.

Having an understanding of the theories behind both the learning and training is necessary to become an effective and successful trainer, but also you need to be able to relate those theories to the training situation in a practical way.

Let's look at the training side of things first and then move onto the learning. The first theory you need to be familiar with is the training cycle.



To develop useful training programmes you need to be familiar with the training cycle, this is important because it gives you a structure to follow when developing and carrying out a training intervention. If you look at the diagram it consists of first of all conducting a training needs analysis for individual or the organisation, (this is often called a TNA) then once this is complete the next step is to set the aim or aims for the training that is deciding what the overall broad purpose is.

The next step is to write the training objectives for the learning that has been identified. This won't always be for just one training course, it could be a whole list of training objectives that then will need dividing up into different learning interventions. Not all of which will necessarily be training courses. There may be other ways of facilitating the learning. The different ways of the learning and development will be delivered are then written into a training plan. This explains the details about how the training is going to be carried out and planned into a process.

The next part of the training cycle is delivering or carrying out the training itself and then the training cycle ends with the evaluation of the training and the learning, and this goes straight back round to the top again to the training needs analysis for the individual and the organisation and the process starts again.

As already mentioned the training cycle begins with the training needs analysis, often called a TNA for short. Conducting a training needs analysis is about making sure that the training to be delivered is going to be effective for the both the individual and the organisation, and this is what the individual really needs to move the organisation forward and obviously it is carried out prior to any training that is delivered.

Unfortunately as a freelance trainer this is a part of the cycle that you will tend not to get involved in. This is the part that the organisation does and the training manager will have done already, and will have written the aim of the training and the objectives for the training before you are involved. However it is necessary to understand the process.

Training needs analysis is carried out under three headings, that is knowledge, skills and attitudes, often referred to as the KSA. When the training needs analysis has been conducted it would have identified what knowledge the people need to do the job, what skills they need and what attitudes they need to be able to do the job in question or perform the actions in question and to the required standard.

As part of this process of conducting a training needs analysis the individuals who are going to be involved in receiving the training are assessed for what their levels of knowledge skills and attitudes are in this particular area. The difference between where they are now and where they need to be is called the training gap and it's the training gap that you will be delivering the training on.

Normally a freelance trainer won't get involved in this process and you will be given the brief for the training. A good training manager will have written the objectives already and you will be able to work from these training objectives.

Good training objectives should be specific, measurable, achievable, related and time bound, the acronym that is usually used for training objectives is that they should be SMART. 'Specific', this is really important so that you know exactly what you should be developing your programme around, training objectives are usually written in a way that states 'by the end of the training participants will', and then words are used to make sure that you know whether they need to understand, whether they have to practice, whether they are going to discuss or whether they are going to learn what is stated next. For example, by the end of the training session participants will understand and be able to apply the training cycle to the work that they do. As you can see the words that are used in training objectives at the beginning are very important to enable the trainer to know to what level the skills, knowledge or attitudes need working on.

Measurable, it is important to be able to find a way of measuring the learning that has taken place against the objectives that were set. **Achievable**, is about making sure that the learning you are going to deliver is acceptable to the group and that it is of a standard of complexity that matches their abilities. **Related**, this is about making sure that the training objectives that have been written all sit together well and it is possible to develop a coherent training course from them that will be able to build on participants learning in a constructive way. **Timebound**, this is usually satisfied by the way the learning objectives are written, often beginning with the sentence 'by the end of the training participants will...'

If you are faced with a brief that doesn't have any written training objectives the best thing to do as a freelance trainer is write a set of objectives from the brief you have been given and send it back to the organisation for them to agree it before you start work on designing the training course. This way everybody understands what the training is going to achieve.

As a freelance trainer you will become accustomed to not being involved in the whole process and just been given the part of the training cycle when the training plan has already been written and the training objectives have been extracted from it. You will have been given the part the training plan that is face to face delivery. Other methods might be used to meet the identified training needs could be to send people to another department or organisation to observe something happening; they may be sent to talk to somebody to learn from them or they may be booked on a course to work through at their own pace, distance learning. You would then deliver that part of the training plan to the objectives that you have been sent or you have written and agreed with the training manager.

The last part of the training cycle is the evaluation. There are two types of evaluation. The evaluation of the learning and the evaluation of the training. The happy sheets as the evaluation sheets are often called at the end of a training course are evaluating the training and they often consist of questions like, 'did the trainer encourage you to participate? Was the training room comfortable? Did the pre course work come to you in a timely way?'

There is usually very little about what was actually learnt by participants on those end of course evaluation forms and if there is it is quite superficial because participants may feel they have learnt something however they won't have had the opportunity to try out this learning that is put it into practice.

The evaluation of learning should take place 2 to 3 or even 4 weeks after the training course has taken place to see what behaviour has changed from the result of the training, what knowledge has been added to and what skills have been developed as the result of the training and also if a change of attitude was part of the learning whether this has happened.

This evaluation of the learning will often bring up further development and learning needs of individuals and therefore the cycle will start again.

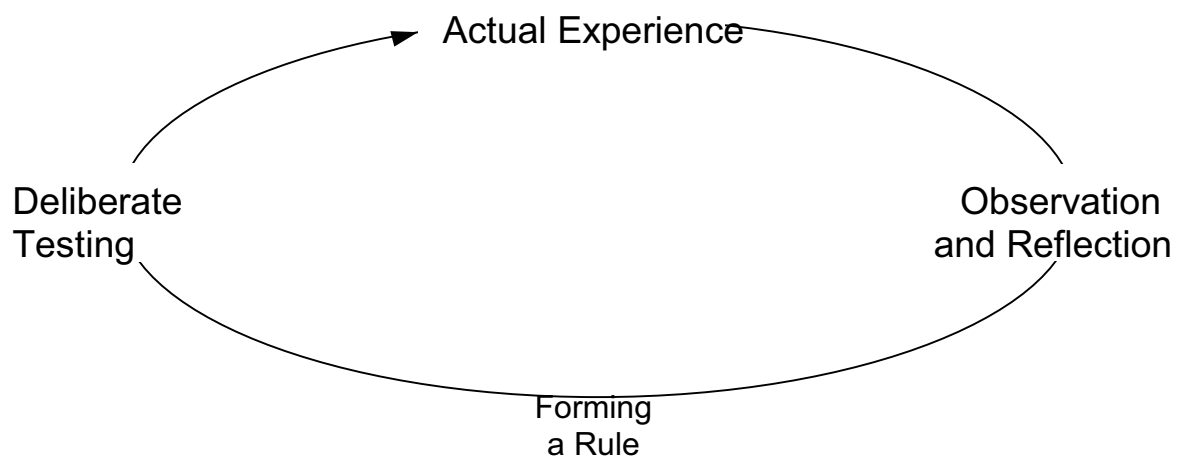
Again as a freelance trainer it is unlikely that you will be involved in this process.

The other important theory that you need to know when you are putting a training course together to help you to decide which training techniques you might be using is Kolb's Experiential Learning Cycle. This is about how different people learn and what should happen to make learning complete.

It can be explained by considering how a young child may come to learn to respect heat. Imagine a toddler doing this by touching the side of a hot oven. This process for learning can be broken down into the into 4 stages.

1. The child touches the stove and feels pain – **an Actual Experience.**
2. The child associates this pain with the oven and thinks about the connection – **Observation and Reflection.**
3. The child establishes a general rule that ovens hurt if you touch them – **Forming a Rule.**
4. After a while the child may cautiously put his/her hand near the oven to check out the rule s/he has made – **Deliberate Testing.**

Kolb's Experiential Learning Cycle



Arranged like this, these actions form what is known as The Learning Cycle. It is seen as a cycle because the process does not stand still. As we learn more, we are continually trying things out, relating them to previous experiences and modifying our rules. In the above example we could see the child perhaps touching a central heating radiator, reflecting on this experience and incorporating the radiator in the same general rule as the oven.

Research has shown us two things about the Learning Cycle, that learning is more effective when the learner is able to complete the whole cycle and individuals have different Learning Styles preferences, in that some will learn better from experiences that emphasise one part of the cycle, whilst others will learn better from experiences that emphasise another part.

Frequently in a training situation learners are given the **general rule** and allowed to **test** it in safe situations by doing certain training exercises. The Learning Cycle may not be completed fully until the learner has the opportunity to apply the rule in a real workplace situation, i.e. to have real **experience** that s/he can **reflect** on and **observe** its application.

It is important therefore, if the Learning Cycle cannot be fully completed in the training situation, that the process of applying the learning to the job (known as **Transfer**) occurs as soon as possible so as to make learning more effective.

It is your job as a trainer to make sure that your participants on a training course complete Kolb's Experiential Learning Cycle in order to have the best possible learning experience. You can do this by designing the training course to include exercises that give participants the opportunities to move around the learning cycle.

Another reason for considering the Learning Cycle is that participants will have different preferences for how they learn. Some participants learn best by actually doing something (having the experience). These people like to try out new things and have new experiences. They usually don't mind taking risks.

Some people learn best by watching other people do something. They often don't like to be rushed into things. They like to consider things before they act. These people like to reflect on things and would enter the learning cycle at the 'observation / reflecting' part of the cycle.

Others on your training course may learn best when they can see the whole picture. This is about understanding the concept you are teaching. They might find it difficult to move on and assimilate the learning until they can see how the jigsaw pieces come together. They learn best when the whole theory of something is explained. They would enter the learning cycle at the 'forming a rule' part.

Other learners learn best when they can see a practical application for the learning on offer and find it difficult to get involved in things that seem esoteric and don't have a practical use. These learners would enter the learning cycle at the 'deliberate testing' point of the cycle.

When you are putting together a training course you need to be mindful of these different learning styles. No learning style is better than another. Participants come in all shapes and sizes and will enter the learning cycle at their own preference. These are natural tendencies which means that each individual will learn better from some training techniques than from others.

Another learning style model to consider is the about different learning preferences in relation to accessing learning in three different ways. These three preferences are visual, audio and kinaesthetic. This learning styles model suggests that most people can be divided into one of three preferred styles of learning.

Someone with a Visual learning style has a preference for seen or observed things, including pictures, diagrams, demonstrations, displays, handouts, films, flip-chart, etc. These people will use phrases such as 'show me', 'let's have a look at that' and will be best able to perform a new task after reading the instructions or watching someone else do it first. These are the people who prefer to work from lists and written directions and instructions

Others may have an Auditory learning style. This means they have a preference for the transfer of information through listening: to the spoken word, of self or others, of sounds and noises. These people will use phrases such as 'tell me', 'let's talk it over' and will be best able to perform a new task after listening to instructions from an expert. These are the people who are happy being given spoken instructions over the telephone, and can remember all the words to songs that they hear!

The third possible style is Kinaesthetic. This means that these participants have a preference for a physical experience when learning. Being able to touch something or perhaps even feel it, or actually perform the task and learn best by practical hands-on experiences. These people will use phrases such as 'let me try', 'how do you feel?' and will be best able to perform a new task by going ahead and trying it out, learning as they go. These are the people who like to experiment, hands-on, and rarely look at the instructions first!

People commonly have a main preferred learning style, but this will be part of a blend of all three. Some people have a very strong preference; other people have a more even mixture of two or less commonly three styles.

There is no right or wrong learning style. However as a trainer you need to be familiar with the different learning styles and the consequences of this when you are both designing and running a training course. When you are designing a training course you need to use different training techniques to ensure you engage individuals with different learning styles at different points in the training. Moving from technique to technique ensures that all your participants will be more engaged at different points throughout the day.

Whatever your participants learning styles are you have to remember that adults learn best when they want to learn and they are encouraged to meet their own needs and are not dictated to by the trainer and they are involved with others in the learning process.

Adults also need to feel that they and their experiences are valued by the trainer and are allowed to be themselves. A trainer should be able to set up a positive learning climate in a training room where participants are encouraged to freely agree or disagree and they can make mistakes without adverse criticism. The trainer needs to be able to develop an atmosphere where the participants are able to evaluate their own progress and performance.

Another important theory to consider when you are planning and delivering training is Maslow's 4 Stages of Skill Acquisition. It is important to recognise that participants go through the four stages of skill acquisition and to try and understand which stage they are at.

The first stage is when a learner is unconsciously incompetent, this is the stage where they don't know that they don't know something. We can liken it to driving a car. There's you there's the car, you have never driven one before so you don't know what you can or can't do. You don't even know really what you are expected to do

The next stage is called being consciously incompetent, and this, if we use the analogy of the car is when you get into the car and you realise that you don't know how to drive it, and so you need to learn what to do.

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The third stage is called being consciously competent and this is sometime later in the car analogy when you have had some lessons, you've been taught what to do, you know how to drive but it is all still very new and you are having to think about it each step of the way so when you're coming to traffic lights you might be thinking I must change down to third gear, then change down to second and if you are going to turn left to put on the left indicator, get in the left hand lane etc. This is the stage of learning that can be quite difficult and tiring because participants are having to think about it all the time. This is sometimes that point where some learners will give up and revert to their old ways of doing things.

The last stage is called unconsciously competent. This is the stage again using the analogy of the car, when you get in and you just drive you don't consciously think about changing the gears either up or down, you don't think about getting into which lane you need to be in or even consider whether you should put your indicator on or not to turn left or right, you just do it.

In fact this is the stage where you can have driven home the route you always drive back from work and when you arrive someone says to you 'they have finished that big roundabout they have been working on for quite some months and must have planted it with flowers last night because when I saw it yesterday it was a bare brown heap and now it's full of beautiful yellow flowers'. You look at them and you say, 'what roundabout?' and they reply 'The one you always pass if you drive home from work on the same route'. You hadn't even noticed it because you were in automatic pilot. You were driving in the unconsciously competent stage.

This fourth stage of skill acquisition, the unconsciously competent stage can also be full of participant's bad habits and ways of doing things that they are not aware of. A lot of participants will arrive on your courses in the unconsciously competent stage of believing that they can just do something and so it's going to be up to you the trainer, to take them on the sometimes uncomfortable route back through the different stages of skill acquisition, particularly to the conscious competent stage to bring in new behaviours and new ways of doing things, which can of course create some resistance.

Whilst this is happening it is important to be able to give good quality feedback to participants. Some of the most important data that participants can receive is from their peers on training courses. Such feedback can provide learning opportunities, helping learners to be more aware not only of what they do but how they do it, and the effect that it has on others.

As trainers, we may often need to give feedback to participants, and should be able to do it in such a way that they feel motivated to act constructively upon it. Trainers also need to be able to receive feedback from course participants, or from other people in the organisation, about the effectiveness and relevance of courses.

Feedback can be invaluable in helping a person fully understand their behaviour and its effects so that they can make choices about how they act in the future. It is the element of choice that makes feedback such a potentially powerful catalyst for change.

As a trainer you need to become proficient at giving (and receiving) feedback, so that it can be used as an aid to learning for others and yourself. Good feedback focuses on the behaviour, rather than the person. It refers to what a person does, rather than to whom he or she is. When you are giving feedback you should talk about behaviour (which may be changed), rather than personality traits (which are difficult to modify).

Good feedback consists of observations, rather than inferences. Observations are about what can be seen and heard by observing how a person behaves, whilst inferences are about interpretations and conclusions that can be made from what is heard and seen. When observing before giving feedback a good trainer will be looking at the 'what, how, when and where' of what happened and what was said. The 'why' makes the individual consider the motive and intent in a situation. However don't make assumptions about these things because this can cause problems of interpretation. Nobody can ever really know what goes on in another person's head.

Always give feedback as a description, (the what, when, where,) rather than as judgment. Describing is about reporting back objectively on what happened, while judgment implies an evaluation of good or bad, right or wrong, nice or not. Judgment can arise out of a personal set of values, whereas description attempts to be neutral.

Be specific about situations rather than general. Feedback is generally more meaningful when it is linked into a particular occurrence and when it is given as soon as appropriate after the observation has occurred. Sharing ideas and options, rather than giving advice. By sharing ideas and information, a trainer can leave a person free to decide for himself or herself how to use what has been offered. This will be in light of his or her own goals and the current situation.

Any feedback provided should be given in the spirit of being constructive within the boundaries of the training course. Feedback should not be given to meet the needs of the giver, for example to cover one's back or in order to hurt the recipient. When you are receiving feedback it is best viewed as a gift from one person to another. It can be offering a challenge, but should not be able to be viewed as a threat.

As trainers we may need to confront a person with the reality of their performance or behaviour, but this should never be done in a way that is threatening to the individual.

When you are planning a training course you need to take into account the theories covered in this chapter to make sure that every participant on your training course has the best possible opportunity to take away what they need to learn from the training session.

7 WRITING A TRAINING COURSE

Once the aim and the learning objectives for the training course have been written or you have been given them, you have to consider how to put the actual content of the training programme together. The main question to ask yourself is ‘which training techniques will best achieve the learning objectives for this training?’

You are going to start with a blank piece of paper or a blank document on the computer. The first thing to do with it, and this isn’t fudging the issue, is to fill in the start time and finish time and allocate times for the break. The latter are often dictated by the venue that you are running the training course in so it can be useful to check this out.

Then you need to decide on the flow of the learning, so looking at the training objectives, decide what participants need to know, discuss or do first in order to begin to understand the content and are therefore able to build on the learning as you take them through the training course. Once you have made your mind up how the training is going to flow you will be able to map out the content through your training day or days. You can then write the subject areas that you are going to cover in each slot between the breaks. As you plan the detail of the course you might decide to change the order to ensure that the learning flows.

To begin with you need to think about getting everyone involved and engaged right at the beginning, so decide on your icebreaker and try and choose or design one that is relevant to the learning that is going to take place.

We have talked about Kolb’s Experiential Learning Cycle and also the other three different learning styles which are auditory, visual and kinaesthetic. You also need to consider what size your training group is going to be and what you think the participants’ expectations are when they attend the training session.

Once you have got the course mapped out with the subject areas that you are going to cover, then look at the training techniques which will best facilitate the participants’ learning, will give a change of pace to the learning programme and will engage different learning styles at different times and will work with the number of participants you have on the course.

There is the idea that you can’t please everybody all the time but as long as you keep moving and shifting the different training techniques to engage the different styles people will be learning and enjoying the process.

As already mentioned it is your responsibility, as a trainer, to create a positive learning climate. Creating a learning climate increases, participant's willingness to participate. However their capacity to learn can be affected by a variety of things that you as the trainer have some control over. Firstly consider the training room. The decision of which training room that you will be used is something that you will probably not have had any control over. However you can usually decide how you want it to be set up.

How the furniture is arranged makes a big difference to how participants react to the training. If the room is set up classroom style it makes the atmosphere appear to be formal and school like and you might find that participants revert to behaving as if there were at school! An open square of tables, with enough space around the sides of the room to be able to work in small groups is usually the best arrangement.

Another factor is the size of the group. This makes a difference to how you as the trainer arranges the exercises to enable learning to be more effective, by breaking the large group into smaller groups.

As a rule of thumb it is useful to consider the following. Getting participants to work in pairs is useful for interviews, sharing of knowledge and practising some skills. Small groups of 3 are useful to use as a buzz group to quickly get some thoughts on or ideas for something or to stir the whole group into action. Groups of 3 or 4 are useful for getting everyone thinking and participating, testing out something that you might feel is too big or sensitive a subject to present to the whole training group. Groups of 4's, 5's, and 6's can be used for a variety of things, for sharing insights and ideas when you are looking for more information than detailed discussion. Larger groups of 6–8 are good for sharing ideas when the group has plenty of time.

The rule of thumb is that the bigger the training group the more skilful the leadership that is required and the more definite the structure needs to be. Break the large group up into small groups if you want participation from everyone because as the group gets bigger each person gets less time to speak.

A trainer needs to be sensitive when working with a training group constantly watching for non-verbal clues and judging whether participants are ready for a change of activity. Concentration wanes after 15–20 minutes on one activity and concentration usually drops off mid-afternoon. You have to use breaks to give space for recovery and re-vitalisation.

Therefore it is best to plan to change the training activity every 20 minutes, otherwise people start to lose interest so it could be 20 minutes working on a case study and then 15 minutes discussion on findings or making presentations to other groups.

In addition to using different groupings for different types of exercises, you will be changing the composition of the groups to allow participants to work with different participants and of course to accommodate different learning styles.

The size of the group is also going to make a difference to the training techniques you will to plan to use. One main consideration is how much presenting back you can do if you have got a large group. If, for example, you have divided into 6 smaller groups to work on an exercise. You don't want each of those groups presenting back their findings to other groups because it will be very time consuming and it can be very tedious.

Some techniques just won't work at all if the size of the group isn't suitable. You need to be familiar with a range of techniques and the advantages and disadvantages of each method; we'll have a look at some of the main training techniques here.

The first one to mention is role play. Role Play is not usually a favourite activity with some participants on training courses. Those with the learning style of 'having the experience' in Kolb's Experiential Learning Cycle usually like it, the 'reflectors' don't mind it if you give them long enough to think about it but the other two styles are not too keen sometimes.

But a role play activity does allow participants to experience as near as possible real life situations in a protected and risk free environment and therefore can be a powerful training technique to use with the right subject area.

When participants, unless it's their learning style affecting, them tell you they don't like role plays, it's often because they have been poorly set up and so you need to set up a role play really well. The situation should be explained in detail and you should brief the participants on what the learning outcomes are for the session. Adults are usually much more willing to take part in an exercise if they know what they are doing and why they are doing it.

They should be told what role each person will be playing, given details about these with either verbal or written instructions depending on the size and the complexity of the situation. They need to be given time to think about how they are going to portray themselves in these roles and not be thrown straight into it.

They should also be told what the timings are going to be for the exercise so they can plan ahead and lastly they should be told what method of feedback about the learning is going to be asked for at the end of the session.

Role play should only be used when there is enough time in the training course to both set up the exercise very clearly and with enough detail so that everybody understands exactly what they should be doing but also with enough time to debrief after the exercise.

It is really important to discuss all the learning that has come out of it positive and negative. It is also important at the end if you have been asking participants to play a difficult role to give them chance to talk about how they felt about playing that role and give them a few moments to get out of the role again and come back to join the group.

The advantages of course is that it is a very powerful technique for getting participants to really feel and understand what is happening or understanding how they might react when they are facing particular situations.

The disadvantages are if the participants really do have an aversion to role-play and are reluctant to take part then it may not work so well. So it's better not to use role plays on the morning of day one, it's much better if you are running a two day course to leave it to late morning or early afternoon on the second day. If you are running a one day course then after lunch on the first day.

When people are more comfortable with each other and have got to know each other a little better, you stand a much better chance of the role play working and of course they need to be used for learning about a situation where it would be difficult to use any other method.

Another method that is used a lot on training course are case studies. Case studies are really useful because they can be used in so many different situations. A case study is a presentation of a specific incident or incidents usually with the relevant background information so that participants can make sense of what is on paper.

It should be about a situation that participants have faced in the past or they know they may have to face in the future. When you are selecting or writing a case study you should consider how you will meet the learning objectives that have been set for the training course and whether the content of the case study is relevant, both to the training course and to the participants. It also needs to be easy to understand and not too complex that it takes half an hour for participants to get their heads around it.

It's always better to write new case studies for each different training course. You may be able to get out some that you have written before and tweak them a little but they must be relevant to the participants on the course with relevant situations and written in relevant language too.

Like most training techniques when you are setting up a case study exercise you should explain the reason why they are doing the exercise and the learning that will come out of it. The case study should be written up and each participant given his or her own copy.

However it is best to give the case studies out once you have explained what you are going to do and how you are going to do it because if you give it out first people will be so busy reading it that won't listen to you telling them how they are going to run the exercise. Go through the case study with the whole group, give them instructions on how the exercise is going to be run, the timings, what feedback you want from it at the end of the session and how you want them to do this. Once you have done this then move them into the small groups in which they will be working and then as the last thing give out the actual case study. Finally give them five minutes to read it and then they can start working on it.

The advantages of using case studies is that it is extremely versatile and case studies can be written to suit the learning that has to take place and the organisation you are working with. They do emulate reality and are therefore often more interesting to participants, and they are safer for them than role-plays.

The disadvantages of case studies is that they can only be two dimensional and participants will sometimes feel that they would have liked to have more information and detail in the case study. It is always a fine balance between giving enough details to participants so they can understand what is going on and not overloading them with stuff they don't really need to know.

If the case study doesn't appear relevant to the group's issues or experiences then they might not be interested or might be unwilling to make the connection, so you need to make sure that the case studies are absolutely spot on.

Another useful training technique is brainstorming. A brainstorm is an outpouring of ideas from the participants, which you begin by posing a question, an idea or a problem. It is done to identify as many different ideas or to consider as many different aspects for the problem or a solution or to act as a trigger to a group's discussion.

These can be organised in an impromptu way if you find that discussion is getting stuck. It is useful to stop and get everybody to throw some ideas out that you can write on the flip chart. However if you are setting it up as an exercise you should explain the process and the rule of brainstorming to the participants; the rule is very simple but it is important and it should be adhered to. The rule of a pure brainstorm is that every suggestion or idea that a participant makes has to be written on the flipchart exactly as the participant has said it.

It doesn't matter if it doesn't appear relevant or even makes sense at this stage of the exercise. There should be no censorship or discussion on what is being called out. This is ideally to stop people considering what they are thinking and deciding whether to say it or not because what you are really trying to get into is lateral thinking. It also works best to write the words at random on the flipchart rather than in columns or in lines or in any particular way that looks like you are ordering them.

When the group has exhausted all its ideas then a good brainstorm should have a stage two. The stage two of the exercise is when things are sorted or ordered in some way, so it makes sense to the participants and to the learning that you are trying to achieve.

What you actually do in terms of sorting the brainstorm really will depend on the learning objectives it could be that you get participants to discuss each idea or thought as it has been written on the flipchart and disregard any ideas that don't make sense or fit in or you could get people to decide which ones they agree or disagree with or rank the contributions in some way.

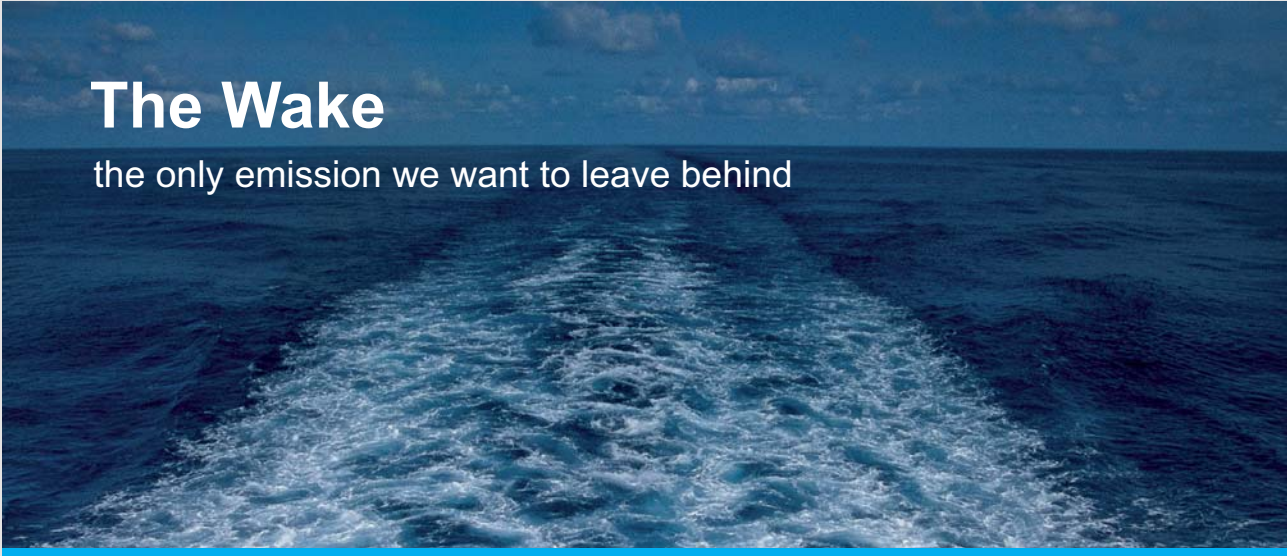
This could be done like a poll with coloured markers given to the group and asking them to come out in two's and three's to cross or tick the items on the flipchart. The items then can be repositioned or blocked to create concepts or actions that can be followed and this can be done as a whole group. Or you can do it as small groups. It depends how big the group is that you are working with and how important it is that everyone is in on this discussion.

The advantage of using a brainstorm is that it is a quick method for generating ideas from a group, it can be lively and fun, it can involve everybody and it can be a quick test to a group's reaction to the subject matter.

The disadvantages are that if you have a quiet group it is sometimes difficult to start the ideas flowing or if you have a group where some people are more dominant than others then the ideas of the dominant people will be the only ones that are on the flip chart and some participants can opt out of the process, by sitting quietly and also if something that is quite contentious goes on the flipchart it can be quite difficult to stop the group discussing it immediately.

Another training technique that you can choose from when you are putting together your training course is a simulation. A simulation is a training activity designed to reflect reality, of course these can include role plays, in-tray exercises or any other learning experience that has a real life aspect integrated into it and in which the learning comes from the participants own experience in the activity and not always the content.

Simulation exercises are often team building exercises, interviews where participants form an interview panel with one person is being interviewed for the job they are a type of role play but they are more grounded in the reality of the situation.



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As with role plays you need to explain the learning outcomes, you must give enough detail to the participants who will be doing the exercise, explain where they are going to be doing the exercise, for example, is it going to be in one of the training rooms, are they going to go outside.

You will also need to set the scene around it; for example, what time of day maybe even what time of year it is in the exercise. What the room should look. If you are setting up a simulation of some interviews then try and make the room look as if it's an office setting or where you would be running interviews and if you can't do that then explain to participants what it would look like so they can imagine and of course they are going to be told very clearly how they should be carrying out the exercise and how they are going to report back the learning that comes out of this, maybe for them personally and collectively for the group with whom they have been working.

Like role plays a simulation should only be planned into a training course when you know you have got enough time to run it properly.

The advantage is that using a simulation exercise that closely emulates real life they can be a powerful learning experience. They are also very interactive and can be great fun.

The disadvantage is the same as a role-play is that sometimes participants can resist taking part in the exercise or not getting fully involved.

Another training technique is a game. The difference between role-plays and simulations is that a game is a training technique that is governed by rules as it has a competitive element and therefore usually results in winners and losers.

Games often don't reflect reality; the learning comes from experiencing the game and the discussion that follows rather than the actual content. Games are versatile tools that can be used in several ways, there are many different types of games from the common family or playground games such as snakes and ladders or a trivial pursuit's type of quiz game or the outdoor type of challenge that can be rewritten to use in a training session using the original concepts.

When setting up any game the rules must be explained very clearly to the participants, one group of participants getting the rules wrong can sabotage the learning outcomes for that group and if there has been a competitive angle between the small groups you can find yourself refereeing rather than training. It is always best to either hand out the rules on a sheet or have them written up on a powerpoint slide or on the flipchart.

The participants must understand why they are taking part in the game and understand what the learning outcomes are meant to be, as games often don't simulate reality they can seem to have nothing to do with the participants learning so understanding why they are doing it is crucial.

The advantages of using games on training courses are it's a way of insuring high participation in the training and hopefully the participants feel they are having fun, it can get participants to interact with each other quickly and it can lead to the group bonding together.

It can also change the pace of a training session, if you have a session that is heavy in input then a game can change the pace and revive interest and energy.

The disadvantages are as usual participants can be reluctant to take part in games, some games can be too physical for some participants so therefore necessary if you have a game of a physical sort to check it out with participants before they come on the course or have a gentler back up game if you think once you have seen your group some of them would struggle.

To recap on setting up an exercise there are 5 steps to follow. Step 1: State the purpose of the exercise to the group. Step 2: Explain the task, carefully and tell them why they are doing it and what learning is intended to cover. Step 3: Explain how the exercise is going to be carried out; the size of the groups, how they are going to divide into groups and how long they have to do the exercise. Step 4: is about how they will be reporting back their findings from the exercise and the last step, Step 5 is giving a brief recap on all that you have already said in case someone has missed part of the instructions.

While the exercise is in progress stay in the room and observe each group to make sure they are carrying out the exercise according to how you have instructed them. Intrude only when they have a question for you or you see they are confused about the task. Whilst the exercise is progressing listen in to the groups conversations and observe the non-verbal clues of the participants so you can decide if they have finished the exercise.

If a group finishes before the others then ask the group who have finished to either take a quick break or to discuss another aspect of the exercise.

8 OPENING A TRAINING SESSION

Once you have planned your training course think about how you are going to begin the course. The start of a training event is very important because it establishes the purpose of the event; sets the tone and the atmosphere and gives participants the opportunity to start to get to know each other. It is also the time when the trainer introduces themselves and establishes their credibility with the group. It is also the time to get participants to concentrate on the training and be motivated to get involved by generating the initial burst of energy to tackle the training topics. At the start of most events the trainer is expected to take the lead and get things moving. If this role is not carried out effectively participants will lose confidence in the trainer.

An important consideration when you begin a training session is the physical arrangement of the room because this affects how participants get involved in the training right from the start.

At the beginning of a course participants need to know each other's names and some appropriate information in order to start to feel comfortable in the situation. The purpose of using an icebreaker at the beginning of a session is to give people the opportunity to speak in front of the group making it easier to continue to speak.

How you open the training session also sets the tone for the training. Is this training session going to be about the trainer talking and the group listening? Or is it going to be about a sharing of ideas, thoughts and experiences led through the process by the trainer? If it is the first then there is less need to run an icebreaker as you have no need to get participants talking. However if it is the latter then it is really necessary to get everyone speaking right from the beginning.

An icebreaker does what it says, it 'breaks the ice'. It generates energy and gets people to feel comfortable in the group, focused on the training and ready to start.

Some icebreakers may be alarming and alienating to some people, so use your judgement about which one to use. It is advisable to have two or three icebreaking exercise ready prepared and leave the final decision on which one you are going to use until you are face to face with the group. In the time you are waiting for everyone to arrive you can observe how the group interacts with each other and their body language as they sit waiting to start. Watch how they are interacting with each other or not! Decide if they appear to know each other, whether there are tensions between some of the group members; whether they look like they are happy to take risks and have some fun; or whether they look serious and adverse to risk taking.

You may be proved wrong as you go through the training but it is much better to try and make an assessment at the beginning and then change your mind as you start working with the group. The first exercise is not the place to take a big risk.

Your choice of icebreaker will also depend on the length of the course you are about to run. On a half day course the icebreaker needs to be very short or it will take up too much of the training time; on a 1 day course you can allow a little more time; on a 2 or 3 day course you can afford to spend longer. However no icebreaker should take more than 20 minutes, otherwise participants might be getting restless to start on the content.

A good icebreaker exercise will also help create the atmosphere that you want within the group. So, for example, you may wish to use an exercise that will get people talking freely about themselves or one that will be fun and help people to relax and enjoy themselves

At the beginning of any course the objectives of the course and how they are going to be met on training course should be explained. This is a good opportunity to check these out with participants so that everyone understands what is going to be covered and how.

Here are a few guidelines that are useful to follow when setting up icebreakers. Firstly make sure you allow enough time at the beginning of the course for an icebreaker, but not too long. The participants might be feeling anxious or nervous and the icebreaker will help to bring them together. Always explain why you are using the exercise, especially if at first it seems frivolous, wild or irrelevant.

The usual way to start a training session is with a welcome, your introduction, an explanation of the domestic arrangements, that is where the toilets are, what time the breaks will be, where to get refreshments and what they will be, a quick run through the 'what to do in case of a fire' procedures; and then a brief outline of the training objectives and the programme.

Then explain what you are going to do as the icebreaker exercise, why you are doing it, then do it. Make sure you fit the icebreaker to the training content. Also make sure it is an exercise that you are comfortable with and that you can set up with conviction.

Give out the instructions for the icebreaker, then repeat them to make sure everyone fully understands, what they are being asked to do, who they are being asked to do it with, how long they have got to do the exercise and what form any feedback with take after the exercise. Because the last thing that you want at this stage is someone not fully participating on the first exercise of the training session.

Here are a few examples of icebreakers

Introductions / Expectations Participants are asked to work in pairs. First they introduce themselves to each other (or if they are already acquainted, to exchange, a few pleasantries) then to spend two minutes taking about their hopes and expectations of the training. Then they feedback in turn, introducing themselves to the group, talking a little about their background (organisation, role etc.) and flagging up their main expectations, which the trainer writes up onto a flipchart. For the trainer, this provides a dual benefit; they find out who people are and get a summary of expectations, which can be used to identify any mismatch between what is intended and what people expect. For the participant, it helps break the ice and gets them used to speaking in the group situation and feeling comfortable that what they want to learn from the course has been explored and acknowledged.

Name Cards: Give each participant a piece of folded card. Ask them to write their first name and to draw something on the card (with the coloured felt tips provided) which reflects how they are feeling about the course. Usually you get a range of responses, which often reflect (quite closely) the mood of individuals. Go round the group asking each person to introduce themselves. From this you can gauge how people are feeling and what you will be dealing with. Name cards also mean that you don't need to ask people to wear name tags or sticky labels.

Objects from the Bag: The trainer provides an opaque fabric bag full of small objects; try and pick unusual or stimulating ones. Pass the bag round the circle, each person in turn takes an object and then tells the group a little about how they associate with the object they have chosen with themselves. This is a useful exercise when you are trying to create 'groupiness' because it forces people to reveal a little of their thought processes without getting too intimate. It can also be quite charming and revealing, creating empathy.

Musical People

This is a good starter if people know one another. All participants sit in a circle. The facilitator stands in the middle, which means there is a chair short. The trainer calls out a statement like “Anyone wearing jeans change places” The object is to get people out of their chairs so anyone wearing jeans has to move. They are not allowed to take the seat next to them or to go back to the seat they’ve just left. The next person in the middle calls out a statement like “Anyone who has a cat or a dog, change” and so on

Card Types

This can be used to mix people up and get them into groups ready for the next exercise and works well with large groups: Prepare several sets of small cards in advance with four types in a set (if you want four in a group); for example: types of flower, colours, cities, weather, cars, clothes (this would be 6 groups of four so you would have 24 people in the whole group). You need the same number of sets for the number of groups you want to divide people into. So the set of flowers might be daffodil, tulip, daisy and rose. Shuffle the cards and give each participant one card (face down so they don’t see what the card says or what the picture is). Then ask participants to find the other people in their set, and to stay with them to form the groups. You can then give out the next instructions about what you want the groups to discuss.

Secret Signs

Sit everyone around in a circle without a tables in front of them. Have an object to pass around (for example, a pair of scissors). The trainer passes the object to the next person having studied it carefully explains they must declare it either “crossed” or “uncrossed”. The next person does the same but the trainer has to say whether they are correct or not. (In fact the crossed or uncrossed is nothing to do with the object but with the person’s legs whether they are they crossed or uncrossed). Eventually some people will get the correct answer either by luck or by observation but they mustn’t tell the others! When most people seem to have grasped the idea, put the others out of their misery!

Birthdays

Another one to mix the group up. Ask all participants to line up according to which month they were born in (January to December). The trainer just needs to indicate which end of the room is January and which is December. This works best with large groups of more than 12 participants.

My Personal Shield

Give each person a piece of flipchart paper, folded into 4 or 6 squares. Write up a list of the areas on the flipchart / powerpoint. Then ask each person to draw how they would depict the subject areas in relation to them.

Ideas for subject areas:

- o The best time I ever had
- o My greatest accomplishment
- o My most prized possession
- o What I would do if I had a year off to do anything I wanted
- o My personal ambition
- o My hobby
- o A work issue
- o What I want from the course

When everybody has had time to draw their response in each square ask the group to pair up and show their sheet to their partner, who then proceeds to guess what the drawings are depicting.

One type of icebreakers are called 'Creeping Death. This is because the trainer starts at one end of the group and ask each person to complete a sentence (it can be useful to begin yourself as this sets the scene for the rest of the participants). Here are some examples of topics you might use.

- ◇ My name is...and something I have in my pocket is. (Take it out and show and talk about why it is in your pocket).
- ◇ My name is...and I like...(choose a subject area that is suitable for the course you are running).
- ◇ My name is...and one good thing that happened to me this morning is...
- ◇ My name is...and I come from...which is famous for; which is...(describe where it is); which has...(describe an attraction).
- ◇ My name is...and...something about your name (what it means, named after someone, nickname etc.).
- ◇ My name is...and if I was an animal I would be a...

These can be a useful style of icebreaker however they don't really work with groups larger than 12 participants. Any more people in the training group means that the last people to participate have to wait too long to contribute to the exercise and the ones who started are beginning to lose interest.

9 GETTING DISCUSSION GOING

A good trainer needs the skills to get discussion going on a training course. A great training course has plenty of meaningful discussions to allow participants to express themselves and discuss new ideas and learning. However some groups are not very good at starting and maintaining discussions. Not all groups will respond with a full discussion when the trainer asks an interesting question. In some training groups certain individuals will dominate any discussion and in the quiet people won't be able to get their views across.

It is always useful to have some discussion techniques ready in case you are faced with a training group that would be helped by having a structure to work to, to get a good discussion going.

A really useful one is the **Agree-Disagree Card**. It is a great tool to direct discussions. The trainer or the participants write statements relating to the training area, one on each card, which give a clear opinion relating to the topic. They need to be fairly extreme to draw discussion. The pile of cards is put in the middle of the group. The first person takes the top card, reads it out and then places it on a continuum drawn on a piece of flipchart paper with Agree at one end and Disagree at the other. The person then explains why s/he put it there. The rest of the group then discusses this the statement on the card. At the end of the discussion the card can be moved to the position that the group agrees is the correct one. The pile of cards then moves to the next person who takes the top one. A note of main points arising in the discussion can be taken.

The cards steer the discussion in a discrete manner. Everyone has a chance to initiate the discussion. Participation of all people in the group is encouraged.

Another great techniques is called a **Round**. This is useful to use at a point where a discussion has got stuck, or where a decision has to be made or if some people have been silent for a long while.

Each person in turn round the room has a chance to speak in relation to the question posed or the request made e.g. what are your views on this now? How are you feeling about this now? What do you want to do next? A person can say pass. Everyone has a clear picture of the others viewpoint. It also can act as a summary and will help people to start listening to each other again, if discussion had become heated.

Dilemma Boards are a technique for problematic situations. The dilemma / situation is written in the centre of a piece of flipchart paper, and 4 possible and different responses to that dilemma are written, one in each corner. The participants then tick their preferred option. When everyone has chosen, the group explores why each person chose the option they did. The groups preferred resolution should emerge from this.

A quick and easy technique is called **Matches**. Each person is allocated a number of ‘matches’ (5–10) depending on the number of people in the group and the amount of time. ‘Matches’ can be drinking straws, strips of paper, playing cards, or Lego pieces, anything that you can carry easily in your trainer’s toolbag. 7 people with 10 ‘matches’ each are about the right number for a 20 minute discussion.

The idea is that a participant can only speak if they use up a ‘match’. This applies even if they are replying to someone else’s question. There is no rule about interrupting so they could throw in their match and interrupt someone but it would be very obvious.

This technique highlights who speaks often and who speaks infrequently. It also increases awareness of the length of contribution. When the people who speak often have used up their matches then those left are able to continue the discussion and usually do.

Another technique that is similar to the Matches is **The Conch** or the **Talking Stick**. The conch or the talking stick should be a beautiful object, which is pleasant and easy to hold, e.g. polished stone, onyx egg, paperweight etc. Any person wanting to make a contribution picks it up, when they have finished speaking they put it back in the centre of the group and the next person who wishes to say something picks it up and makes their contribution, or passes it to someone who has indicated that they want to speak. The possession or holding of the conch entitles any participant to speak and have the attention of the group.

The passing of the conch is a visible representation of the pattern of the discussion. It increase awareness of how often individuals speak and for how long. Sometimes people who find it difficult to break into a discussion find it much easier to hold out their hand for the conch. Use of the conch makes interruptions much more obvious. It also slows down the discussion and usually makes each contributor more thoughtful about what they have to say.

A more complicated technique is **Roles in Groups**. Each person has a role card and they are asked to behave in this role during the discussion. Roles could include: saboteur, silent one, coordinator, chairperson, peacemaker, supportive person, and devil’s advocate but would depend on the reason why the participants are having the discussion.

Another technique is called The **“Poker” Game**. A pack of cards is needed for this technique. On each is typed a category of contribution e.g. giving information, asking a question, seeking clarification, building on another’s contribution. These are dealt out so each person has perhaps about five.

Discussion commences on an agreed topic. Participants have to make their contributions using the category of contribution for which they have a card. They put a card in the middle each time they speak. The topic should be one that is a “hot” issue provoking lively debate in that group. The purpose is to increase awareness of the type of contribution you personally tend to make. This should then encourage effort to broaden your repertoire. A by-product is it heightens awareness of roles people play in the group.



10 DEALING WITH DIFFICULT BEHAVIOUR

Unfortunately no matter how long you spend planning the perfect training course you will at some point be faced with difficult behaviour from participants. It may be they have their own agenda going on, which you will perhaps never know what it is. They may have been sent on this course and they don't think it is suitable for them; maybe they think they already know everything you are going to cover; or some people just don't work too well in groups!

Whatever the reason for a participant being 'difficult' when you are running a training course and disrupting it you need to deal with it fairly swiftly. The whole group must come first and the individual must be made aware that the behaviour they are displaying isn't acceptable as it will hinder the learning of the rest of the group.

When handling problem situations the goal is always to eliminate or minimize the behaviour but very importantly to maintain the self-esteem of the person causing the problem and also to avoid further disruption of the group's process

Firstly identify possible alternatives that you could use to deal with this participant. Maybe you have been on course and watched a trainer deal with a similar situation and it worked well and you think it would fit the current situation that you are facing.

Evaluate your ideas about how you are going to try and solve this against the criteria of minimizing the behaviour of the individual whilst maintain their self-esteem.

The dominant participant or those who take up a lot of time by talking. One way to deal with this is to establish a procedure whereby each person contributes one idea to the topic being discussed and must then wait until every other participant does the same before contributing again. Or you could try interrupting the person who is talking tell him or her that you need to hear from others in the group. Start this interruption by saying, "Thank you for giving all of those ideas. Let's hear from the others in the group now."

To deal with a withdrawn or shy person try doing some warm-up activities when the group first starts to work together and occasionally thereafter. This should help even the quietest person to feel more comfortable with the other group members. And you could talk with this person privately. Find out what he or she is thinking and feeling. Ask this person how he or she would like to participate. Ask if they would be happy for you to direct questions to them when you think he or she has experience or ideas on the topic.

There may also be participants that you have on your training courses that might be labelled as an avoider. Someone who won't deal with any difficult issues and says that they have never come across anything like this and never will. You should keep the group working on problems and tough issues until solutions are found. Try asking direct questions to gain ideas from the avoider so this person stays involved. And also talk with the avoider privately to find out what's going on for them at this time.

If you find you have someone who disagrees (without giving a reason) or criticises what others are saying, stop the group and introduce a contract and groundrules with them. Or if you have done this at the beginning of the training course review it and reinstate it.

These guidelines should include the rule that all ideas will be accepted. The very first time someone criticizes another person, this rule must be reinforced. To maintain the self-esteem of the degrader, you may need to do this in private. Confront the degrader with, "You may have a point, but we need to solve our problem".

The unco-operative participant can be difficult to cope with if they are refusing or questioning everything that you are asking them to do. Again either stop and discuss groundrules for working together or review the one that the group had agreed at the beginning of the training course. Try and incorporate statements in the guidelines that deal with cooperation and interruptions. Most important encourage this person to explain the reasons behind his/her objection.

Those that talk to the person sitting next to them whilst you are talking can be very disruptive for everyone. These are usually called the 'side conversationalists'. Again set guidelines and expectations at the beginning of the training course. But when it does happen stop the training session, ask those involved in the side conversation to share what they are talking about with the group. Or stop the training session and comment that it is difficult for you to hear the other discussion or to concentrate on the topic in hand with side conversations going on.

Also privately talk with the distracters and discuss their expectations for the training session. If they are different from what is being covered at this time suggest that they could leave and return to a session that includes their expectations. Or suggest that they wait patiently and quietly until the subject they want to discuss arises. Empower others to confront the distracters with how these side conversations keep everyone from concentrating on the groups' discussion.

11 USING VISUAL AIDS

Visual aids are used as an aid to the learning. We use visual aids to reinforce memory and learning.

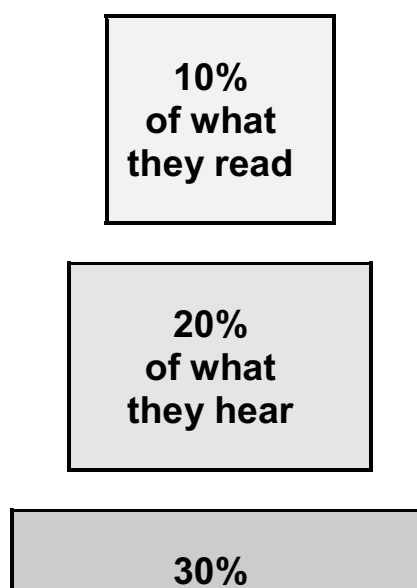
The most important thing to remember when you are using visual aids is that they do not replace you. Secondly they must be visible so therefore make sure that lettering, drawings, diagrams, etc. are clear and large enough to be seen from the back of the room. Use colour for emphasis, but remember that colours like orange and yellow reflect light and are more difficult to see from a distance than blue or black. Make sure that flipcharts / screens are placed so that everyone can see them.

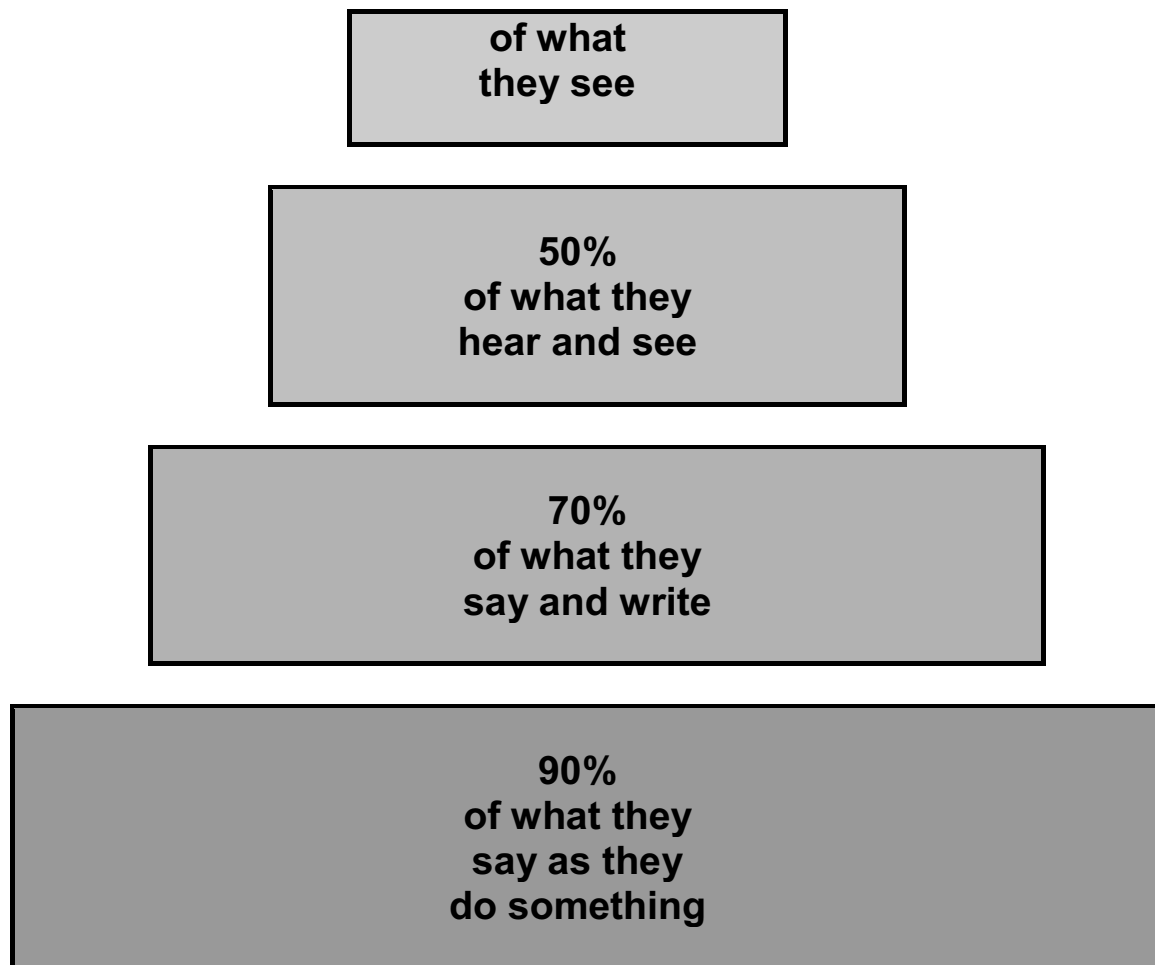
Keep visual aids simple and to the point. The rule of thumb is 3 points on each powerpoint slide. Make sure that what you illustrate is relevant. The points you emphasise on a powerpoint will be the ones your participants will most remember so they should be the main ones.

Don't display your aid before you need to refer to it, or after you've finished your participants attention will be held on the aid instead of you. Make sure that you are really familiar with any presentation before you show it so you know precisely what you want the learners to get from it.

Dale's Cone of Experience

People Generally Remember





The attention of the group is on you and this shouldn't be distracted by your powerpoint presentation. So besides thinking about the content you need to pay attention to how you come over. Consider what image you want to project when you are running a course, an important part of it is what you are wearing.

You need dress neatly but be comfortably. Wear clothes that are appropriate for the group you are training. A simple rule of thumb is wear something that doesn't make you appear to be different from the group you are working with; a suit when you are training a group of youth workers wouldn't be a good idea and neither would a pair of jeans if you are training a group of Chief Officers.

The way you dress, the way you move, the way you sound can help set up a 'climate' conducive to learning. Don't wear anything that is too noticeable. Unless you want to be remembered more for what you were wearing than what you have said.

Also don't wear anything that will take your attention away from the group and turn into an annoying habit, e.g. a short skirt that has to be pulled down every time you sit down, or a pair of trousers that really needed a belt resulting in you having to hitch them up every time you stand up.

You need to be your own visual aid and you should never hide behind visual aids or think that a good powerpoint presentation can replace your enthusiasm. A good trainer will start develop rapport with a training group right from the start. A good trainer needs to be enthusiastic and get everyone involved in the training as soon as possible.

Your facial expressions, the tone of your voice, your movements and your gestures will all have impact. Make an effort to be enthusiastic – enthusiasm is contagious! Use your hands to illustrate movement and form. Smile and look as if you are enjoying yourself.

The volume, speed and tone of your voice should reflect your emotions. You will catch and maintain attention if you pause occasionally. Speak clearly and loudly enough for everyone to hear you without having to strain. If you have trouble projecting your voice practice reading aloud. If necessary seek help from a colleague. You must maintain a voice that is loud enough for everyone to hear throughout the training day.

When you are training move naturally and confidently. Be your normal self only better. That is be natural but eliminate any annoying mannerisms. If you think you haven't got any then the bad news is that you probably have, because everyone has some. Get friends or colleagues to give you feedback about these so you can make an effort to overcome them.

Also mime is very effective non-verbal form of communication. A shrug of the shoulders, a smile, and a look of dejection can say more than words when you want to get the groups attention or to emphasis a point.

Try practising in front of a mirror. A good trainer isn't afraid to do a little acting or storytelling to illustrate a point. A sense of humour is a valuable asset for all trainers. Enjoy yourself and your participants should enjoy themselves too.

12 EVALUATING TRAINING

After any training intervention has been delivered there should be an evaluation. Evaluating training serves a number of purposes. Primarily to find out if the training objectives that were set when the training was planned have been achieved. The evaluation is also the opportunity to have feedback on the content and style of the training so necessary changes can be made to any other training that is going to be delivered. Also to help the trainer to become more aware of how their training style impacts on participants.

Importantly organisations want to know if the training has been value for money, which is about how participants have increased their skills and knowledge to help them do a better job, do something differently and have learnt new information that is needed. Lastly it completes the training cycle and possibly identifies where further training is needed.

Evaluation is a process that involves the planned collection of information so that informed judgements can be made about the value or effectiveness of something. Measuring the value of training is not easy, however, the evaluation of both training and learning is important and should not be sacrificed or compromised because of difficulties that might be involved.

After all, considering the resources, money, time, personnel, and effort that are invested in the training evaluation makes good sense; organisations need to know if their investment has paid off.

The process of evaluation will be greatly simplified if the training is originally founded on a set of clear objectives. Initially identifying specific learning objectives facilitates the evaluation of the results. Objectives are written with the intention of evaluating the training and the learning designed to achieve them. Therefore, they can measure the extent to which that training has achieved the objectives.

Evaluation of training measures the effectiveness of the training to both the learners and the organisation however it should be divided into two components. Both the training and the learning should be evaluated separately.

The evaluation of training is carried out the end of the training course, with participants completing evaluations forms. These are often dubbed as the 'happy sheets'. This is not about evaluating the learning but will often ask about what participants have learnt, along with asking them to comment on the physical arrangements of the training room, the refreshments and the trainer's style. It can't be a reasonable account of what participants have learnt but can ask for their initial reactions. At this point the participants have not had time to try out the new learning that has taken place during the training session.

The evaluation of learning should take place 2 or 3 weeks after the training intervention after participants have had the opportunity to try out the learning in the workplace. This is usually done by the organisation and a good manager will make sure this happens. As a freelance trainer you usually only get the results of the 'happy sheet' that you give out at the end of the training session.

13 ASSESSING YOUR SKILLS

Now you have almost come to the end of reading this book it is time to assess your skills as a trainer. What are you really good at and what areas do you need to improve. An important part of being a trainer is believing in personal development. That is what you will be working on with other people and it is a principle that you should apply to yourself.

The sad fact is that when you are working for yourself you are only as good as your last performance that is your last training course. As a freelance trainer you are a dispensable item.

Your need to be able to put together excellent training interventions that are interesting and motivate your participants to take part and come away having learnt what they need to learn and hopefully more.

You have to be able to handle a group and keep them on track in the learning environment; dealing with any difficult behaviour in a constructive way. Being able to ensure the group enjoy the training and want to come back for more. And importantly tell their managers and colleagues that the training course was brilliant, relevant and fun to attend.

You need to have great presentation skills and be able to hold the groups attention for the whole day or whatever the length of the training course is. Part of this is about making each participant feel comfortable with you and the rest of the group. It is your job to speak clearly, to speak with enthusiasm and to make sure any instructions you give, usually concerning setting up exercises are comprehensive and participants feel comfortable.

You really need a sense of humour. Some situations you might find yourself in have to be shrugged off and made the best of. Maybe a training room that is interrupted by a band practise in the next room booming loud music through the paper thin walls at intervals, usually when you have just started speaking, or finding yourself working in a room far too small for the size of the group.

These situations and other, too numerous to mention have to be dealt with, with flexibility. As a freelance trainer it will be rare you are completely in control of the training venue. You have to greet any difficulties with gritted teeth hidden by a smile and always with a 'can do' attitude.

You also need to be flexible with the training you are running. Sticking to your notes when the group doesn't appear to be very interested can be the kiss of death in a training situation. You have to be prepared to ditch your notes and go with what the group need to learn sometimes.

You also need to be cheerful and enthusiastic at all times. Even when you don't feel like it. The participants, quite frankly, don't care if you have a headache or you have had a fraught journey to get to the training venue on time.

And also, and sometimes one of the hardest, you must like people. That is all people even the unlikeable ones. It isn't your place to make judgments on individuals and even the ones who are giving you a hard time you have to find a way to work with and hopefully win them over.

13 FINDING WORK

Finding working is the key to being a successful freelance trainer. It isn't always easy and almost impossible from a standing start. You need to find a way to get into an organisation. The best way is to begin with all the contacts that you already have and start to communicate with them.

Start compiling a database of all your contacts and beginning to email them with news about what you can offer and also anything current in the sector that you are intending to work in.

You also need to have developed your marketing plans. Make sure you have got a good website and the name you have decided to work under is easy to remember. It is no good starting to make contacts until you have got your website and other promotional materials ready. When someone has met you for the first time their next step will usually be to go and look at your website to confirm what you have told them.

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When you manage to get an appointment to meet a training manager remember you have to convince them that you are there to give them a solution and you can deliver the training they need to make their workforce more skilled and change their behaviour and attitudes. The training course isn't what you are selling. You are selling a solution.

You are also selling yourself. You are the expert who can deliver the solution. You need to come over in a lively and enthusiastic way. People buy people.

You also need to develop a reputation. This is the age of testimonials. Earlier on I said if you haven't delivered many training courses then do some for free as a way to build a reputation and get testimonials. Remember to put the testimonials on your website. If you can get peoples permission to use their name attached to their quote even better. It gives it authenticity.

Use social media as much as you can as it is the most cost effective way of getting yourself out there. You can set up a Facebook page, sign up to LinkedIn, write a blog, and put some videos of you in front of a group on You Tube. All this will help to give you a presence. Particularly posting videos of you training or speaking as prospective customers can see you in action. That is what they are buying not the written words of your training outlines.

There are no short cuts to finding work and there are no easy steps you can follow. You must just get yourself out there. Attend networking events, volunteer to give a short presentation to the group. If you do this then the group will witness your presentation skills, so they need to be good.

Also work on your elevator pitch. This is the term used for being able to sum up what you do or what you are selling in the time it would take for a lift to travel one floor in a building. The message is be succinct, people lose interest very easily.

Ask people for referrals. If you know somebody who knows a training manager then ask to be introduced to them. There is a difference between being pushy and putting yourself out there. Remember whilst you are sitting in the comfort and safety of your desk you aren't earning any money.

Once you get an invitation to tender for some work then make sure you write a good proposal that hits all the buttons that the prospective client wants to hear about. See a sample proposal in the Appendix. Writing proposals take time as thought and care should be put into them. However you can develop your own template and it will be quicker the more that you do.

Sometimes you will be asked to do a piece of work without having to tender for it. When this happens make sure you put everything in writing to avoid any confusion about what you are agreeing to deliver.

Write (an email is sufficient) to the organisation stating the title of the training you will be delivering, a list of the course objectives, the date the training will take place, along with the venue details; the training fee that has been agreed along with any travelling and subsistence expenses you will incur. Also the maximum number of participants you will take on each training course and if it is relevant the minimum number you can work with.

Add to this your terms of business (unless they have sent theirs to you) and a course outline for each training course you will be delivering. Add a note into the letter that the course outline is a proposed outline for them to agree or ask for amendments.

Build a reputation for being good to work with. Set yourself your own customer service standards and stick to them. Just because you are working for yourself doesn't mean you can afford to do things just when you want to or feel like it. Make sure you respond to emails in a timely fashion, adhere to training managers deadlines, even if you have had to work late into the night to respond.

Word of mouth is the best way of getting business not only from training managers but from course participants who tell their friends and colleagues how great the training course was that you ran. Make sure you have your business cards with you at all times and easily available for people to pick up. Put your contact information on the last slide of your powerpoint presentation. Offer to email your presentation to your participants and then you can collect their email address and add them to your database (if this is appropriate) and they have got information about you on the powerpoint presentation that you have sent them.

I have had an interesting and varied life working as a freelance trainer. I have met 100's and 100's of fascinating people and been into 100's and 100's of interesting organisations. I have worked in some amazing venues and some bizarre ones too and have travelled to places I wouldn't have normally got to. But the best part of it all was that I have learnt so much from all the fascinating people that I have worked with and had a lot of fun to.

Good luck on your journey into the world of freelance training.

APPENDIX 1

LIST OF TRAINING METHODS

Case Studies	The trainer presents a written case study or participant(s) outline their own description of particular situations and their responses. The trainer and/or others comment on these.
Brainstorm	Participants problem solve by freely contributing a variety of ideas for action. These are noted without comment or criticism. When ideas are exhausted, the best are selected / sorted.
Buzz Groups	2–6 people discuss an issue or problem for a short period of time. Used for clarification, feedback, consolidation of learning, information, variety, a space for 'shy' participants to contribute.
Lecturing	Provide information by verbally telling people.
Videos	The trainer shows a video, or extracts from them. They can be used in a number of interesting ways e.g. tracking one person, stop/start for discussion, comparing reactions.
Games	Participants engage in a game which is competitive, requires choices and actions and will have a result.
In-Tray Exercises	Participants receive correspondence that they need to answer. The correspondence contains issues relevant to the theme of the training. These can be invented or you can look back at people's actual correspondence and how they handle it.
Opinion Cards	The participants have a series of statements written on cards, such as 'Britain is a classless society'. Each person takes it in turns to read out the statement and place it on an imaginary line between 'agree' and 'disagree' and say why they have placed the card in a certain place. Others join in with their opinions to create a discussion. Only the first person can move the card if they are convinced by the others arguments.
Quizzes	Participants are tested about their knowledge on a particular subject by undertaking a quiz. Multiple choice quizzes work the best.
Simulation	An aspect of the real world is simulated. Participants are asked to be themselves in handling the issues presented by the simulation. Their performances are discussed. e.g. running a meeting.

APPENDIX 2

YOUR VIEWS PLEASE – SAMPLE

We, at XXX, would appreciate if you would spend a few minutes completing this form to give us your views on the course you have just attended. Please hand it to the trainer before you leave.

Course title _____

Your name _____

Organisation _____

1. How closely did the course content match what you wanted to be covered?
Not at all: _____ : _____ : _____ : _____ : Completely
Any comments?:

2. Please attempt to assess your level of interest in and enjoyment of the course as whole.
Not at all: _____ : _____ : _____ : _____ : Very interesting
interesting

Not at all: _____ : _____ : _____ : _____ : Very enjoyable
enjoyable
Any comments?:

3. a) Are you going to do anything differently as a result of this training? YES / NO
b) Please describe the most important change(s) you plan to make

4. Which aspects of the course content would you say made the strongest impression on you?

5. Have you any suggestions or observations regarding the course?
6. Are there any additional aspects you would like to have seen included this course?
7. How did you feel about the length of the course, was it:
too short ☐ about right ☐ too long ☐
8. Would you like to make any general comments.

APPENDIX 3

EVALUATION FORM – SAMPLE

Please complete this form on the training that you have just undertaken. Your comments will be valuable in enabling us to assess the effectiveness of our training courses.

Title of course: Date:

Please record your responses to each of the following questions by circling the appropriate number on the sliding scale:

	Low					High
1. How much did you learn from this course?		1	2	3	4	5
2. How relevant to your needs was this training?		1	2	3	4	5
3. How enjoyable was it?		1	2	3	4	5
4. Were training objectives met?		1	2	3	4	5
5. How would you rate the course structure?		1	2	3	4	5
6. How would you rate the course content?		1	2	3	4	5
7. How would you rate the training approach?		1	2	3	4	5
8. Were you given sufficient opportunity to participate?						
9. What was the most useful part of the course?						

10. What was the least useful part
of the course?

11. What could have been included
to make it a better training
experience for you?

12. Any other comments you wish
to make.

**If you are happy to give your name and the organisation you work for, please do.
(This information is entirely optional.)**

Name: Organisation:

We would like to add you to our data base so you can received information about
further training and special offers (we do not share our data with anyone else)

EMAIL ADDRESS

THANK YOU FOR TAKING THE TROUBLE TO
COMPLETE THIS EVALUATION EXERCISE.
YOUR COMMENTS AND ATTENTION ARE VALUED.

APPENDIX 4

TERMS AND CONDITIONS OF BUSINESS – SAMPLE

PAYMENT TERMS

All training confirmed in writing is due for settlement within 14 days of receipt of Invoice.

TRAINER(S) SUBSTITUTION

The company reserves the right to substitute the designated course trainer(s) in case of illness or late unavailability. The company will ensure that any replacement trainer(s) will have similar experience, qualifications and expertise as the original trainer(s).

TRAINING PROGRAMME CANCELLATION FEES

BY CLIENT

Cancellation Fee

More than 4 weeks prior to the course

No cost

Less than 4 weeks up to 2 weeks prior to course

50% of agreed fee

Less than 2 weeks prior to course

100% of agreed fee

BY THE COMPANY

The company will re-schedule the course

Reduction fee

More than 4 weeks prior to course

No reduction

Less than 4 weeks and up to 2 weeks prior to course

25% reduction on agreed fee

Less than 2 weeks prior to course

50% reduction on agreed fee

NAME AND CONTACT DETAILS

APPENDIX 5

PROPOSAL – SAMPLE

Customer Service Training

To: XXXXX

From: XXXX

XXXX is a well established training company, with a reputation for practical, results focused training interventions. Our team of experienced and lively trainers have many years experience in the training arena, and bring with them a passion for developing people. Our client base is in the not-for-profit, voluntary and community sectors where we have successfully worked for 20 years.



Struggling to get interviews?

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We have worked with 100s of organizations, some examples are:

XXXX

XXXX

XXXX

XXXX

XXXX

XXXXX...and many more

Customer Care Training

Creating a positive first impression on the telephone or face to face is about being confident, courteous and professional. Research has shown that 68% of customers perceive an attitude of indifference.

This half day course will focus on ensuring that all those who attend have a positive attitude and a high level of skill, to give an exceptional customer service experience, ensuring your organization is rated highly in terms of service.

What will they gain?

- knowledge of how to give exceptional service to all customers, even difficult ones
- a more positive and confident attitude when dealing with customers, reducing their stress levels and increasing job satisfaction

Programme includes

- how to greet customers and make a **positive first impression**
- effective listening skills – to **find out what the customer really wants**
- the essential inter-personal skills for dealing with customers confidently and skilfully
- the five steps for dealing with **customer complaints** politely
- how to keep a **positive attitude, stay motivated and give an excellent service**

SUGGESTED COURSE PROGRAMME

10.00	Introduction to the day • The importance of excellent Customer Service • What is excellent Customer Service • recognizing internal & external customers • customer service standards • recognizing the different ways we interact with customers & the impact of this on the corporate image • So...what do customers actually want? ◦ 4 basic human needs
11.30	Break
11.45	How to deliver a great service Effective Communication • asking the right questions • listening to the customers • statement / question technique • skilfully directing a conversation to ensure the customer gets the best service Dealing with difficult customers • keeping cool and diffusing difficult situations Action planning and evaluations
1.00	Close

Methodology

The course would be designed as a mixture of input, work in pairs; small group work, using case studies and some role play situations. We would ask your permission to talk to yourselves or identified members of staff, over the telephone, to collect information about the situations that they deal with on a day to day basis, to ensure that the case studies and role plays used on the course, emulated their real life experiences as closely as possible.

We would also want to have sight of your Customer Service Standards and Customer Complaints Procedures.

Course Numbers

Ideally we like to work with 12 participants on a course to maximize their individual learning experience.

Fees

Our fees are XXXX per day plus traveling expense at XX per mile/ 2nd class rail fare – from XXX. This includes all preparation to make this a bespoke course and sets of participant workbooks/ handouts for each participant.

Trainer

Sandy Leong is an experienced trainer. She has headed up the Sahara Consultancy team for the last 20 years working in the UK and Internationally.

She is a trained teacher, starting her career in the education system before moving to the Voluntary Sector. There she undertook a number of developmental roles including, a Volunteer Bureau Organiser, a Training Development Officer and a CEO of a Racial Equality Council.

She is a published author, having written How to Develop a Talent for Training, for those wanting to improve their training skills; and has written many training manuals including Delivering Excellent Customer Service.

She works with small, medium and large organisations to help them develop their staff to get the results that they want.

NAME

CONTACT DETAILS

DATE

APPENDIX 6

CONFIRMATION OF TRAINING – SAMPLE

ADMINISTRATION SCHEDULE

Trainer:	
Organisation:	
Contact:	
Title of Training:	
Date of Training:	
Venue:	
ON YEAR PLANNER	
Fee Charged to organisation:	Expenses:

ADMINISTRATION CHECKLIST

Confirmation letter sent to organisation Date	
Course outline/programme prepared:	
Handouts prepared:	
Participants list received: Venue details received:	
Course outline/programme sent to organisation: Handouts sent to organisation:	
Invoice No.	Sent to organisation:
Payment received:	

Notes:

APPENDIX 7

YOUR ADDRESS

ADDRESS OF CUSTOMER

DATE

Dear XXXX,

I am writing to confirm the following course booking:

Title: XXXX

Date: XXX

Time: XXX

Venue: XXX

Fee: XXX + travelling expenses @ XX per mile

Maximum number of participants XXX

Minimum number of participants XXX

Equipment:

Please provide a flipchart stand & pad, laptop and powerpoint projector.

We look forward to working with you.

Best wishes

Sandy Leong

Head of Training

Enc: Terms & Conditions

SANDY LEONG



Trainer, Author and Professional Speaker.

If you are looking for ideas, or off-the-shelf training materials visit
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