



California Distance Learning Health Network

A non-profit organization under the Graduate School of Public Health

SDSU

**Immunization Registry:
Train-the-Trainer Workshop**

Trainer's Guide

***“Practical Tips for Being a Great Trainer and
Overcoming Workplace Challenges”***

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Agenda

This document details one session of the Immunization Registry Train-the-Trainer Workshop, *Practical Tips for Being a Great Trainer and Overcoming Workplace Challenges*. It outlines the session in detail and provides guidance for the facilitator. The agenda for the session is as follows:

Topic	Time	Length
Welcome	9:20	5
Who are your customers?	9:25	10
How are you different from other trainers?	9:35	5
Practical tips for great training	9:40	20
Training challenges	10:00	20
Questions	10:20	up to 5
Training Tips (separate handout)	10:25	15

Welcome

Time: 5-10 minutes

- Workshop attendees will already have the Participant's Guide in their binders.
- Welcome the group and introduce yourself as a fellow trainer. Say something like "Because time is short, I'm going to get right to the point. By the end of this hour, you'll be able to answer the following questions (please see page 4 in your participant guide):"
 - *Who are your customers?*
 - *Where do they work?*
 - *Why are they unique?*
 - *What frustrations do they have?*
 - *What does this mean to you as a trainer?*
 - *What is great training?*
 - *What does this mean in practice?*
 - *What challenges will you face delivering technical training in the workplace?*
 - *How can you overcome those challenges?*

Who are your customers?

Time: 5- 10 minutes (depending on how long the Welcome took).

Goal: To develop empathy for customers and set realistic expectations for training

- **Start a discussion by asking the group, "Who are your customers?"** The answer is Medical Assistants and front office staff who work in public health clinics and private doctor's offices.
- **Now ask, "What makes them unique?"** The class may have some of the answers, but be sure they get this critical "take away" information:
 - This group is unique because unlike doctors and nurses, Medical Assistants and other office staff do not have to be certified by the State or have college degrees. Instead, their training is at the discretion of the employers. In practical terms, this means that Medical Assistants and doctor's office staff are a very heterogeneous group whose ages, educational levels, cultural backgrounds, languages and skill levels are quite diverse.

- *What does this mean to you as trainers?* This means that you should be prepared for a variety of training experiences, some simple and straightforward, and others more challenging. While you can't be prepared for every situation, the practical tips you learn today and strategies for overcoming challenges will help make every session a success.
 - **"What are their days like?"** Ask the group to imagine what it is like to be a Medical Assistant or front office person in a clinic. What challenges do they face? What frustrations do they have?
 - Low pay
 - Language barriers
 - Culturally diverse customers
 - Scared children
 - Skeptical, reluctant parents (fear of vaccines, doubt about the need for them)
 - A lively work environment
 - Frequent job turnover
 - Note that given the challenging nature of their jobs, not every healthcare worker is going to be as enthusiastic about the Registry as the trainers are. That's why empathy --along with excellent training skills--is essential to successful Registry training.
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How are you different from other trainers?

Time: 5 minutes

Typically, training for medical office staff receive:

- On-the-job training by supervisors or mentors
- Training by commercial companies (out of the office, often expensive)
- Vendors who have sold their practice expensive equipment or products
- CEU trainings to fulfill requirements for licensed staff

In contrast, a training offered by your immunization registry is..... (Facilitator provides answers below)

- Registry training is free (an excellent value)
- Registry trainers are from “the government”
- There is no capital investment by the doctor/medical practice
- The Registry is not mandatory in California. Therefore, your training must both hold their interest and exemplify your “product’s” benefits and ease of use.

Practical tips for great training

Time: 20 minutes

Goal: To define great training in useful, practical terms.

- **Ask the trainees to finish the following sentence(s):**
 - "A great trainer is..."
 - "A great trainer always..."
 - "A great trainer never..."
- **Write their answers on the board.** Use this to lead into a guided discussion about training, and help the class make as many of these points as possible. (Encourage the class to take notes on page 4 of their Participant's Guide.) A great trainer...
 - ◆ Helps people help themselves.
 - ◆ Is encouraging and supportive.
 - ◆ Is an active listener, meaning that they repeat back what they heard to verify comprehension. (*"So you are asking..." "What I hear you saying is..."*)
 - ◆ Avoids technical terms.
 - ◆ Gives learners their complete, undivided attention.
 - ◆ Responds with words or phrases that indicate they are listening. (*"Yes," "I see," "I can imagine,"* etc.)
 - ◆ Makes the material relevant to the learner(s). (*"These skills will help you..."*)
 - ◆ Keeps things moving along.
 - ◆ Creates a comfortable environment where learners feel safe making mistakes.
 - ◆ Pays attention to learners to find out if they are engaged, OR lost and confused.
 - ◆ Uses questions to keep learners focused, gauge comprehension and keep them interested.
 - ◆ Lets the learner use the computer at all times. If they have to help, the trainer asks if it is ok to use the computer.
 - ◆ Is enthusiastic about the Registry.
 - ◆ Knows the Registry's "selling points" and subtly shares them during training.
 - ◆ Is an expert on the Registry, so that learners never hear them say "I don't know..."

- ◆ Says, “Let me look into that and get back to you” if they don’t know the answer.
- ◆ Asks for input during training and feedback afterwards.
- ◆ Learns from customers and continuously improves.
- ◆ Knows what great customer service is and delivers it during every training session. (Refer participants to their **Customer Service Basics** handout on p. 5 of their guide, which is a copy of the following list)

Customer Service Basics

- ◆ It is not just what you say, but how you say it that matters.
- ◆ Great customer service is really just common courtesy and good etiquette. (listening carefully, being polite, treating people with respect, etc.)
- ◆ Treat people the way **they** want to be treated.
- ◆ Be courteous, respectful and professional, and remember that you are representing the Registry at all times.
- ◆ Customer service can make or break the experience. It will strongly influence your customers’ decision to use the Registry (or not). It will also affect what they say to their colleagues, who we also want to use the Registry.

Training challenges

Goal: To prepare the class for training challenges and develop strategies for overcoming them

Time: 20 minutes

- **Ask the participants to turn to p. 6 in their guide.** Instruct them to read this scenario and be prepared to discuss it in 5 minutes.

Jim is a professional trainer who loves computers, and fancies himself "tech savvy." His current assignment is to train secretaries in a busy office how to use a new software program that will eliminate lots of paperwork and automate many processes that are currently done by hand. To minimize time off the job and to save travel costs, Jim will deliver 1-on-1 training in the workplace.

Jim arrives at the first training session armed with a software manual and tremendous enthusiasm for the job. He loves computers and can't wait to share the virtues of the software program with his clients.

Jim's first client is Marge, a middle-aged woman who has been with the company for 23 years. She takes him to her cubicle and offers Jim a seat. Jim sits down at her computer and Marge sits next to him.

Jim says, "To launch the program, double click on the typewriter icon" and proceeds to do that. As the program starts-up, Jim tells Marge about the great features of the program:

"It is like Word, but greater functionality but uses less working memory."

Marge yawns. Jim wonders why, but doesn't say anything because he does not want to ask a "personal question." Instead, he quickly shows Marge how to create a new document, insert and format a table, AND create a gorgeous header/footer. Jim is pleased with their progress. Marge opens her purse and searches for her new pink lipstick.

Jim starts to show Marge how to do the next task on the checklist when the phone rings. Marge answers it and handles the call. When she is done, she says, "Where were we?"

Jim asks, "If this isn't a good time..." Marge says, "No, this is as good a time as any." Jim gets back to business. He shows Marge how to create a folder and save the file to the folder. The phone rings again and Marge handles the call. Jim is irritated but says nothing.

A few minutes later, Marge tells Jim that their time is up. Jim is concerned that they did not complete all of the tasks on the checklist but has another session to get to and prepares to leave. He asks Marge if she has any questions and she says, "No." Jim is pleased as he takes this to mean that Marge learned what she needed to and that the training was a great success.

- ◆ Do you agree with Jim?
 - ◆ Why or why not?
 - ◆ How would you feel if you were Marge?
 - ◆ Do you think she'll use the new program?
 - ◆ What would you do differently if you were Jim?
 - ◆ How would you handle the challenges that Jim encountered? (interruptions, not enough time, disinterest, etc.)
- **Lead a 10-minute discussion on the questions above.**
Encourage note taking on page 7 of their Participant's Guide.
 - **Use the following table to analyze the scenario with the class.** (It is located on p. 8 of the participant guide.)
 - **PLEASE NOTE: You will not have time to go through the whole analysis line-by-line, so strongly encourage the class to read it carefully on their own time as they will 1) learn a lot and 2) avoid Jim's mistakes.**

Analysis

<i>Event</i>	<i>Issue</i>	<i>Strategy</i>
<i>Jim does not preview the training with the customer.</i>	A critical part of successful training is to preview the event so that learners know what to expect and what is expected of them.	Jim should have shared the training objectives with Marge at the start of the session.
<i>Jim sits down at her computer and Marge sits next to him.</i>	People learn far more by doing than by watching .	Jim should have taken the chair next to the computer and asked Marge to sit at the computer so she could

Event	Issue	Strategy
<i>"It is like Word, but has greater functionality and uses less working memory."</i>	Jim used technical terms during training and risked confusing Marge and causing her to worry that she was "out of her league."	perform the training tasks. Unless a trainer knows that the client is computer literate, it's always best to use everyday language during a technical training.
<i>Marge yawns. Jim wonders why, but doesn't say anything because he does not want to ask a "personal question."</i>	Jim chooses not to check in with the client and instead plows ahead with the training.	Jim should have used questions to find out what was happening to Marge—was she lost and confused or just sleepy? Was she learning?
<i>The phone rings again and Marge handles the call. Jim is irritated but says nothing.</i>	At this point it is clear that Marge is distracted, unmotivated or both, but Jim doesn't say or do anything to improve the situation.	Jim should have asked Marge "Is there a quieter place where we can work?" or rescheduled the training for another day.
<i>A few minutes later, Marge tells Jim that their time is up. Jim is concerned that they did not complete all of the tasks on the checklist but has another session to get to and prepares to leave.</i>	Jim and Marge run out of time and do not meet their training objectives.	Jim should review/document what was covered in the training session using a checklist and then schedule a follow-up appointment to complete the training.
<i>He asks Marge if she has any questions, and she says, "no."</i>	Jim and Marge did not develop rapport because Jim was very focused on the software program and its functionality and not on the learner.	Jim should have taken the time at the start of the session to create a safe, comfortable training atmosphere at the beginning of the session by briefly getting acquainted.
<i>Jim is pleased as he takes this to mean that Marge learned what she</i>	Jim has no idea if the training was successful because he doesn't know if she can perform any of the	Jim should have let Marge perform and practice the tasks throughout the session

Event	Issue	Strategy
<i>needed to and that the training was a great success.</i>	training tasks because he did them all.	and evaluated her performance at the end.

- **Ask participants to turn to page 11 in their participant guide.** Review the *Strategies for Handling Training Challenges* table with them, and encourage them to use it on the job.

Strategies for Handling Training Challenges

CHALLENGE	STRATEGY
<i>Interruptions</i>	▪ Anticipate interruptions and understand that they are a predictable part of workplace training. ▪ Try to get back on track ASAP. ▪ Ask if there is a quieter place where you can continue the training. ▪ If they become a real problem, ask if there is a better time and schedule a follow-up appt.
<i>Inadequate time</i>	▪ Prioritize training based on the learners' need. Cover "have-to-knows" first and "nice-to-knows" second. ▪ Give your customers information on how/where to get help if they need it (the User Manual, the Registry Help Desk, training materials, your contact information.) ▪ Schedule a follow-up appt at the customer's convenience, as soon as possible after the first training session.
<i>Weak computer skills</i>	▪ Create an environment where the customer feels safe making mistakes. ▪ Encourage the customer to perform all computer tasks. People learn by doing, not by watching. ▪ Break the tasks into small steps. ▪ Applaud small successes. ▪ Be supportive and offer frequent praise. ▪ Be patient. ▪ Share a story about something that was hard for you to learn.
<i>Poor attitude/lack of motivation</i>	▪ Be empathetic. ("I understand how you feel...") ▪ Acknowledge their concerns. ▪ Share the Registry's selling points or benefits.
<i>Language barrier</i>	▪ Listen carefully. ▪ Ask the customer to speak more slowly. ▪ Repeat back what you understand and ask questions about what you don't. ▪ Ask if someone else in their office can help them

CHALLENGE	STRATEGY
	communicate with you. ▪ Remember that they are doing their best to communicate with you. ▪ Be polite and respectful. ▪ Check your attitude--make sure it is positive, helpful and friendly at all times.

Questions

- Ask if there are any quick questions. Remind the trainees that the handouts from this session were designed to be used on the job to support their performance.
- Thank them for their time and their contributions to the session.