The Evolution of a Technical Writer into a Trainer:

My Journey from Transmission to Interactive Delivery

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Cohort #10

Applied Inquiry Project

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Abstract

This paper explores the personal journey I am taking to become a better trainer and adult educator. This action research project will delve into my background as well as training issues I encountered prior to entering the MAEA program which included improper usage of PowerPoint and solely depending on one teaching style. Since this is a self improvement project, one of the primary goals of this journey is to take into consideration how adults learn so as to improve my delivery. Using reflection and the need to improve, I want to learn to adapt my training style to encompass multiple learning styles, incorporate components of Neuro-Linguistic Programming (NLP), and use narration.

Keywords: learning style, teaching style, action research, power point, NLP, 4MAT, narration

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Evolution can be defined as a "process of gradual, peaceful, progressive change or development" (evolution, n.d.). The progressive change previously described is a great depiction of my professional career. Thirteen years in the making, my gradual career development has been full of discovery and enlightenment. The changes I've noticed have been not only eye-opening but informative as well. Although I didn't clearly see the path I was taking when I started, everything I've done from college to this moment has strategically placed me exactly in the place I want to be – learning about myself, how to relate to others, and ultimately how to be a better communicator. This project is not simply just a requirement for graduation, it is a self-improving endeavor. It will serve as a tool that will be used to reflect on where I've been, where I am, and where I would like to go. Using an action research methodology, I will use reflection to gauge the things I feel I'm doing well and seek out areas where I can improve based on the literature and research I've amassed during my time in the Educating Adults program. My findings will discuss: a) The story of how I came to develop a heavy reliance on Power Point and why I needed to change; b) My discovery of communication styles and how that affected my trainings; c) Why it's a good idea to leave my training comfort style and work on the ability to weave stories into my lessons; and, d) My plan to recreate a consistent training platform regardless of the topic or time format. This self-examining view will lay out the path I'm travelling from a Technical Writer to a Corporate Trainer.

Background

Before an evolution can occur, a starting point must be established. I graduated with an undergrad degree in English with an emphasis in Technical Writing from Northern Illinois University. Why Technical Writing? I never felt comfortable with my skills in math or science but I knew I was pretty proficient in liberal art type subjects. I settled on English because I noticed I gravitated towards research and writing papers. One of the things I like most about research papers is that I can choose the most obscure angle around a topic and as long as I supported my point with valid research, I could never be told it was wrong. This was important because most times when doing an assigned paper, I was being facetious and the topics kept me entertained. Flash-forward to the start of my junior year when I needed to declare a major, I chose English because of the large number of courses I had already taken. Now the dilemma surfaced – what can I do with an English degree other than teach?

> A little background story - the teaching option was totally out of the question for me as I instantly imagined myself in an elementary or high school classroom surrounded by students exactly like I was – talkative, high energy pubescent jerks! (That scenario would have been a great example of the saying, "what goes around comes around.") I recall what it took for the teachers I looked up to, to get through to me and I knew I didn't have the patience or desire to be successful at it. Coming from an inner-city school in Chicago, I've unfortunately experienced teachers

> that showed up just to receive a paycheck and I refused be
> one of the people selling school children short.

After a consultation with my advisor and doing some research, I stumbled across careers in Technical Communications – specifically technical writing. The Occupational Outlook Handbook produced by the Bureau of Labor Statistics (2012) classified a technical writer (also known as a technical communicator) as a producer of "instruction manuals and other supporting documents to communicate complex and technical information more easily. They also develop, gather, and disseminate technical information among customers, designers, and manufacturers" (n.p.). [The slacker in me emerged] "Really, they pay people to do that?!? All the instruction manuals I've seen look like they were written by a three year old – I can't possibly be a worse writer than a three year old!" Although admittedly not as easy as I first imagined, the career path was right up my alley.

I took an internship and later a job with an international company with one of its sectors specializing in Heating, Ventilation and Air Conditioning (HVAC) for large skyscrapers and other commercial and industrial structures. According to Ben Minson (2010) – a technical communicator, writer and cartoonist – a successful technical communicator is one "who understands both the audience and the subject matter, clearly communicates what the audience needs to know when they need to know it, and puts the content where the audience will get it (n.p.)." As a tech writer, the three traits it helps to possess are the willingness and openness to learn, the ability to be analytical, and a personable demeanor. In other words, you need to know how to ask the right questions and be able to elicit answers using different avenues (such as email, interviews, and research), deliver the content that best fits the situation and audience, and do it in a way that doesn't rub those you rely on or create for the wrong way. So, here I was writing instruction manuals for a HVAC company where my product revolved around large-scale ventilation systems; my audience was the engineer installing or updating the system and my subject matter expert (SME) was the programmer that built and programmed the machinery. Here lies why I had a job – those two individuals (the programmer and the site engineer) couldn't be more different. Each person had his or her own language, goal and viewpoint. I considered myself a mediator between the two sides because my job was to translate the programmer speak into layman's terms for the poor individual trying to install this piece of machinery – often in a dusty boiler room of a semi-complete construction site.

After six years of working at the building controls company, I left because I didn't feel I was learning any new skills. I was essentially doing the exact same job I did as an intern and I was worried that if I was laid off, I wouldn't be marketable with the set of skills I had acquired. My next move was to an insurance company. They needed someone to help rollout and document a new tool they acquired for recruiting salespeople into the branch offices. As time passed and I became the SME, my role steadily evolved from documenting to training. Although my goal for my job at the insurance company was similar to my previous position – translate programmer's speak into something understandable to a layperson – my platform changed. As a technical writer, my entire objective was to present the facts in a clear, succinct, and thorough way via an instruction manual or user guide. Now as a business analyst, I went from detailing the information on paper via print to detailing and delivering it in a PowerPoint format for a class setting. I soon realized that I gave presentations and tutorials the same way I wrote training documentation, by presenting everything there was to know about a topic buffet-style. In other words, I would serve everything on the menu at once but it was up to the learners to come with their appetite. This scenario is ideal for an instruction manual but not so much for a face-to-face training. In hindsight my presentations via PowerPoint were long and monotonous because I was heavily relying on my knowledge of the tool but I had no knowledge of adult learning concepts or facilitation methodologies. My lack of knowledge about these topics had me presenting a product that I'm sure was subpar at best. I spoke too fast, I read directly from the PowerPoint deck, and the deck itself was poorly constructed – defying conventional multimedia principles.

Methodology for Reflection

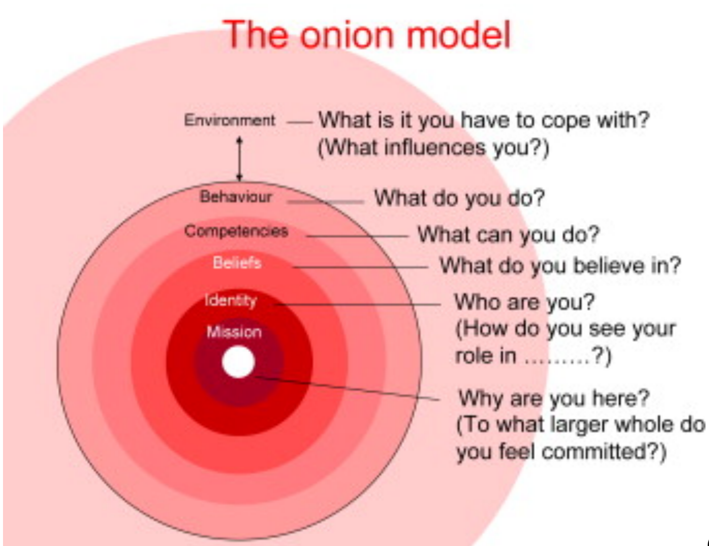
Based on the history I presented of my training background, this project gives me an opportunity to assess where I was versus where I would like to be. One way to do that is to pick a methodology that is conducive for comparing the past with the present. The methodology I have chosen for this project is action research. "Action research has as its goal to address a specific problem within a specific setting, such as a classroom, a workplace, a program or an organization. This kind of research often involves the participants in the research process, thus blurring the distinction between action and research" (Merriam, 2009, p.4). Action research is often the research method of choice for teachers and educators looking to improve on their practice. This reflective process allows for inquiry and discussion, giving the introspective researcher the ability to address issues or concerns he/she might consider an issue or problematic. According to Ferrance (2000), "implicit in the term is the idea that a practitioner will begin a cycle of posing questions, gathering data, reflection, and deciding on a course of action...It is not problem-solving in the sense of trying to figure out what is wrong, but rather a quest for knowledge about how to improve" (p. 2). This method is perfect for me as I am looking to revamp and improve my presentation style.

An important part of action research is reflection. From a professional and personal development standpoint, critical reflection is a key tool in getting to the root cause of the catalysis as well as direction of your change. There are numerous models on reflective inquiry. One that is of particular interest to me for this project is called the Core Reflection Model. It is a modification of an adoption of a model created by Kolb and Fry (1975) for cyclic reflection. The original model consisted of four phases: experience, reflective observation, abstract conceptualization, and active experimentation. Although a good start, I must agree with the commentary stating that this particular model "seems to be more useful for describing the analytic processes needed for a better *understanding* of practice then for improving the relation between the person of the practitioner and his or her work environment, i.e., for enhancing personal effectiveness" (Korthagen & Vasalos, 2010, p. 530). After continued investigation, I found a model that fit my needs more closely.

In the 80s, Fred Korthagen (a professor of Education in the Netherlands) and his team published a revision to the Kolb and Fry cyclical reflection model that had five phases. The fifth phase was added to make it closer align to the needs of improving the practitioner. The five phases are: Action; Looking back on the action; Awareness of essential aspects; Creating alternative methods of action; and, Trial. Korthagen (1985) referred to the revamped model as the ALACT model (named after the first letters of phases). Although much improved from the Kolb and Fry model, a weakness still existed in which practitioners would focus on finding quick solutions and not necessarily the underlying phenomena causing the dissatisfaction (Korthagen & Vasalos, 2010). The research duo felt that what was missing was something called "Core Reflection." In their eyes, practitioners fall short of their goals because they are not reflecting on all levels. According to Korthagen and Vasalos (2010):

> As soon as people are more in touch with their own identify and mission, this not only creates change of perspective toward the daily hassles of the profession, but it also opens up the doors to more transformational changes. It may also lead to new types of behavior that are more in line with people's missions and inner potential…as soon as a person is more in touch with the inner levels , this can begin to influence the outer levels. Once such a link between the "inside" and "outside" is established the reflection process starts helping to connect the "core" of the person to the effective behavior of the outside world. (p 536)

So what does this core or onion model look like and why would it be helpful in my situation? The picture below helps illustrate the point:



(Korthagen & Vasalos, 2005, n.p.)

The onion model, as it is referred to, has the following layers:

- Environment – What influences you?
- Behavior – What do you do?
- Competencies – What can I do?
- Beliefs – What do you believe in?
- Professional identity – How do you see your role in said environment?
- Mission – To what larger whole do you feel committed?

When applied to me, it reads like this:

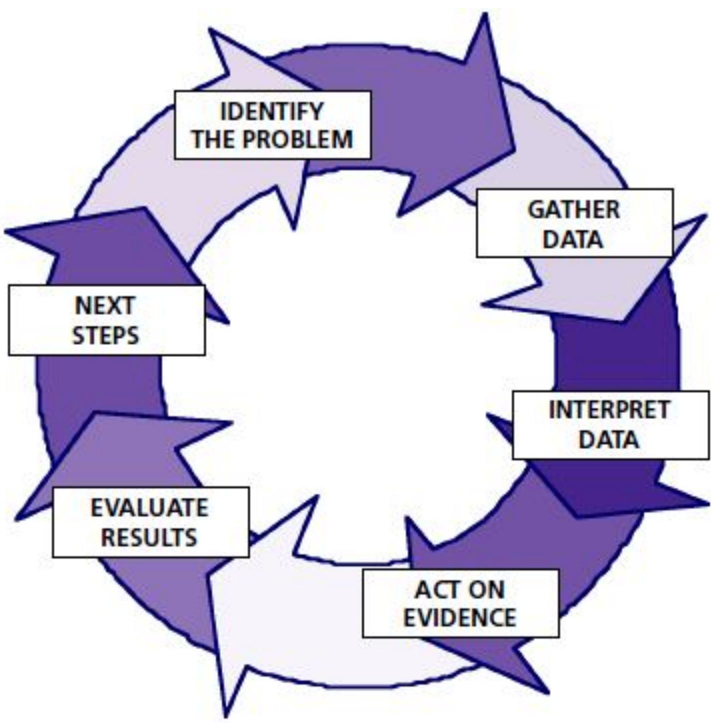
- *Environment*: I was recently with an insurance company in what used to be a division of their IT department. Before my departure, the area was sectioned off and labeled Field Recruiting. In my role within the section, I was responsible for training the field agents, recruiters, and managers on the recruiting tool used to recruit insurance agents into the offices. I have since left the company and am doing project management consulting with one of the largest banking institutions in the United States. Although my training responsibilities have been severely reduced, what sent me down this path is the inadequacy and lack of depth I felt when I feel when presenting. I felt like I was constantly feeding more and more information into my learners but not really keeping them engaged.
- *Behavior:* I feel I was relying too much on Power Point and not truly connecting to my audience. I don't feel that my lack of delivery came from the fear of not being able to

answer a question or not knowing the material. On the contrary, I was the SME and therefore knew the ends and out of the tool.

- *Competencies:* My ability to be reflective upon my current training skill set in order to seek improvement as well as being adaptable and proactive enough to see this iteration of the transition through the end.
- *Beliefs:* I believed that the people coming to my trainings were not getting their full worth. I felt as if I was boring them and that the same questions they came in with are the same they would leave with since they were zoning out.
- *Professional Identity:* According to Fenwick (2008), "work communities are powerful sites of identity where individual workers' desires for recognition, competence, participation, and meaning are both generated and satisfied. Identity is ultimately a representation or mental conception that we ascribe to ourselves and others" (p. 22). With that said, I am a trainer. The definition the Bureau of Labor Statistics (2013) provides is one that "design and conduct training and development programs to improve individual and organizational performance" (n.p). Unfortunately, despite conducting and creating trainings for over five years, I still feel like a pseudo-novice due to my lack of training depth/variety. Down the line, I aspire to be a Director of Training where I'm not only able to conduct but mentor and set direction for the training needs of an organization. This means I need to be capable of training not only technical courses but soft-skills such as leadership and conflict resolution as well.
- *Mission:* Ultimately, I want to be a trainer who is able to make a difference to the learners I encounter. I know that by taking a sincere interest in my learners, everything else (career advancement, continued marketability, and relevance in the field) will follow. To

give the learners the information and attention they need, know that I cannot be a 'one trick pony.' In order to achieve my training goals, I must be open-minded as well as "F.A.T – flexible, adaptable, and trainable" (J. Glick, personal communication, February 7, 2013).

With the core reflection model as a point of reference, I will move through the five phases of inquiry designated for the research model. The steps are cyclical so that you are always improving upon the knowledge you attain about yourself. See the picture below:



(Ferrence, 2000, p. 9)

The steps are:

1. Identifying the problems
2. Gather data
3. Interpret data

4. Act on evidence
5. Evaluate results

When applied to me, it reads like this:

1. Identifying the problems
   - What can I do to enhance my training and facilitation style to better engage adult learners?
2. Gather data
   - By amassing old presentations, self assessments, and other pieces of my training history, I will compile data to show a pattern of what I've done, what it means within the larger scope of educating adults, and what needs to be changed
3. Interpret the data
   - Analyze and identify major themes for improvement
4. Act on evidence
   - Create lesson plans and templates to address issues that have been identified
5. Evaluate results
   - Are the changes beneficial? What needs to be tweaked? Repeat cycle when necessary.

By applying the overarching "onion" insight to my action research steps, I feel I have a reflection model that puts me in touch with my core goals. This very personalized research will allow me to take an in-depth look at where I've been, where I am now, and how I want to improve for the future. *So, what can I do to enhance my training and facilitation style to better engage adult learners?*

Gather and Interpret Data

My training style entering the MAEA

Before you can help others, you have to be aware of where you fall in the equation. In the realm of adult education, it helps to assess your learning characteristics so that you have more insight on how your learning patterns effect how you present. Mackeracher (2004) noted that "effective facilitators need to be aware of their own learning style, how this style affects their preferred facilitating strategies for helping individual learners, and how learners with similar or different learning styles are affected by these facilitating strategies" (p. 80).

Previous Personal Learning/Teaching Style

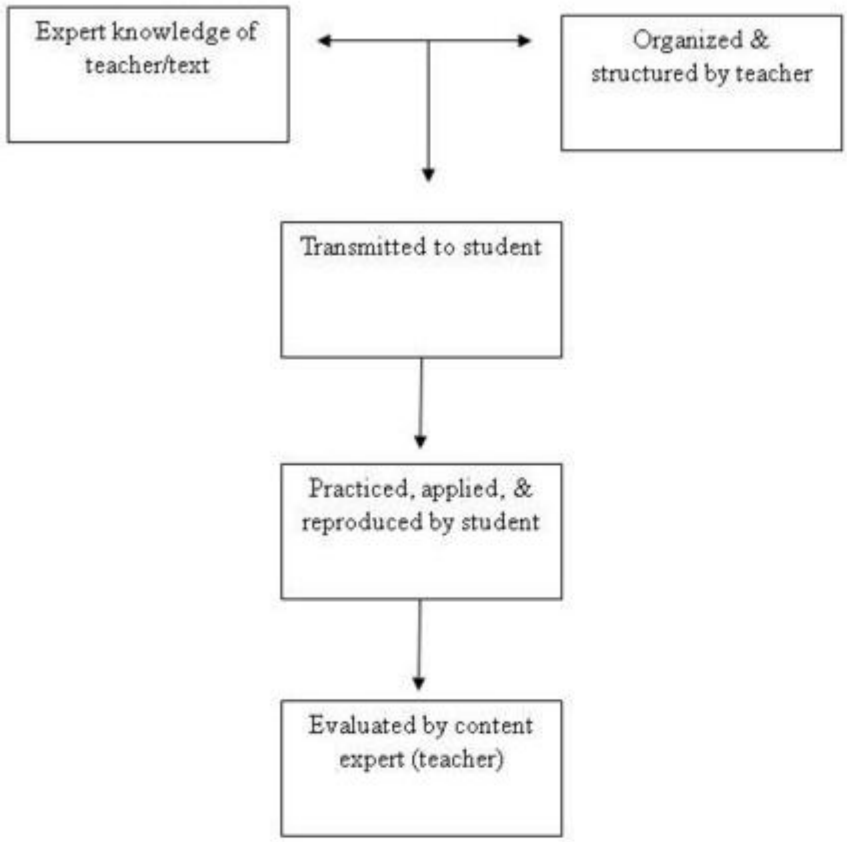
I took two different online inventories to asses my learning style: VARK and Learning Styles. VARK indicates your learning preferences among the following: **V**isual, **A**ural, **R**ead-Write, and **K**inesthetic .The second one adds a few more categories that include: Visual, Aural, Verbal, Physical, Logical, Social, and Solitary. The VARK results suggest that I'm a learner that prefers to take information via Read/Write. According to the site, "this preference emphasizes text-based input and output – reading and writing in all its forms but especially manuals, reports, essays and assignments. People who prefer this modality are often addicted to PowerPoint, the Internet, lists, diaries, dictionaries, thesauri, quotations and words, words, words..." (Fleming, 2010, n.p.). The other site actually highlights social (interpersonal) as my strongest preference. According to this site, I communicate well both verbally and non-verbally, tend to be in tuned to others motivations, moods, and/or feelings, and gravitate towards professions such as teaching, training and counseling (Advanogy.com, 2004).

Now that I'm aware of my strong learning preferences for the written word and interpersonal relationships, I looked back at the Teaching Perspective Inventory (TPI) I took in

April 2010 at the height of my training days and at the start of the MAEA program. The instructor informed the class that it would give us useful insight into each of our teaching philosophies. At the time, I didn't think much about the results but in retrospect, the report directly points to one of the main underlying issues of my discontent. The TPI results indicated that I have a dominant Apprenticeship perspective with a Transmission backup (they are only two points apart – Apprenticeship 36/45 and Transmission is 34/45). Based on these two perspectives, there is a strong need to be in command of the content and to present that content thoroughly. For apprenticeship, the teacher must know the inner workings of the content in order to translate the information into accessible language for the consuming learner. (Sounds very much like my technical writing roots.)The backup perspective, transmission, strives to represent content accurately and efficiently (Pratt & Collins, 2013). As I reflect on my mentality at that time, there was a strong need to have everything right to ensure my continued credibility. This mix of perspectives now better explains my top-down teaching style.

Transmission Delivery

Boldt (1998) diagramed an insightful chart that clearly breaks down my delivery style at the time:



(Boldt, 1998, n.p.)

Transmission teachers mold their lessons based purely on the material in which they are the subject matter expert in. Due to their vast knowledge on the topic, they are able to address many nuanced topics via detailed examples and thorough answers to questions asked. On the flipside of that coin, although transmission teachers can be thorough and organized, they may find it difficult to work with people that do not understand the base logic of the content. According to Pratt (2002), the learner's disconnect with the base logic "causes difficulty anticipating where and why learners are likely to struggle with the content" (p. 3). Other stumbling blocks a transmission trainer may encounter is connecting real world scenarios to classroom content, using the content as protection against challenging or difficult learners, and talking too much – using responses to questions as an opportunity to talk more.

From an adult learner's perspective, transmission may make her or him feel like boot camp soldiers or small children as the information is fed to the person with very little exchange. In a study done by Trigwell, Prossner, and Waterhouse (1999), instructors that view learning as information accumulation and feel teaching is simply transmitting information to students, tend to use a teacher-focused strategy like transmission. Unfortunately, teacher strategies that highlight an information transmission/ teacher focused approach report having "students adopt more surface and non-deep approaches to learning" (p. 65). This is how I felt my sessions felt onto others. Not only did I embody all of the transmission stumbling blocks in my delivery but also with my strong Read/Write learning perspective, I was heavily relying on PowerPoint.

PowerPoint Overuse

PowerPoint in itself is not a bad program but when it is misused, it can become an element of a learner's worse nightmare. One reason this could happen is if the presentation is constructed improperly. There are four design principles that should be followed when constructing a proper PowerPoint (Garner, Alley, Gaudelli, & Zappe, 2009):

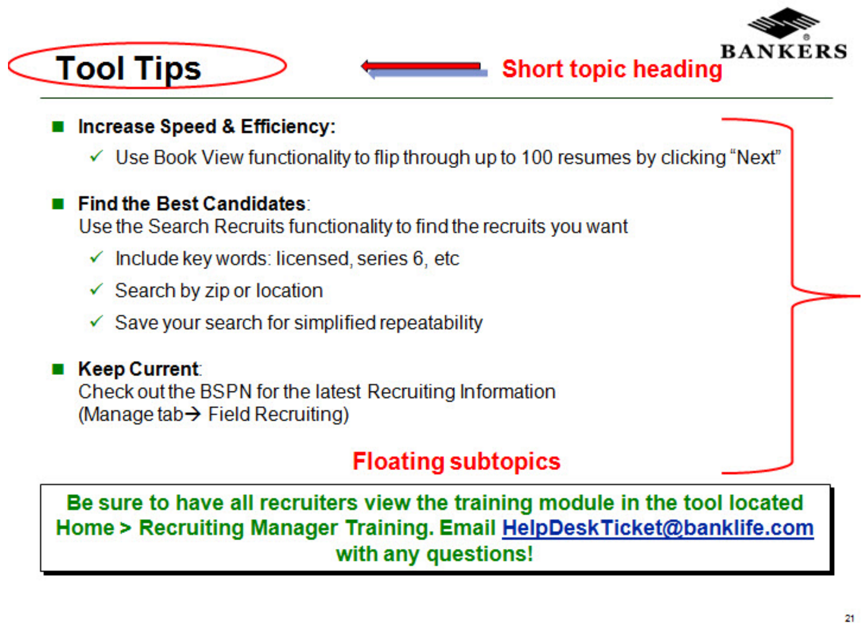
- Multimedia Principle - individuals learn better when words and pictures are presented, not just words alone
- Coherence Principle – comprehension and knowledge retention improve when you reduce the amount of extraneous information on the slide
- Signaling Principle – learners benefit from highlighting essential material to clarify informational relationships
- Redundancy Principle – comprehension is significantly reduced when learners read and hear identical information simultaneously

These principles are violated by a majority of PowerPoint users mostly because of the defaults the tool is built with. PowerPoint defaults are based on a topic-subtopic format. When using that format, some of the common mistakes made include the use of nondescript short phrase topics, wordy slides and ineffective text/graphic pairings. For example:

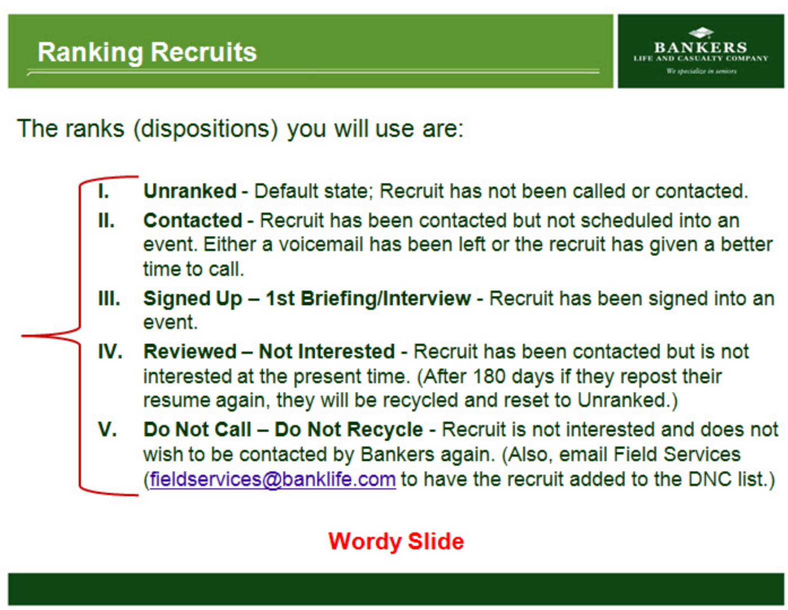
- The use of short phrase topics is a direct correlation to the topic-subtopic default. Their use does not present a clear perspective of the speaker's intentions. Without that direction, the topic will not draw an immediate relationship to the adjoining body text, allowing the authors subtopics to meander and wander
- The use of wordy slides is a result of another template default, the bullet text default. "Covering the middle and lower portions of the slide…this text box default occupies 60% of the space on the slide master. By displaying such a large box, this default leads users, especially novices, to fill the slide with text" (Garner, et al, 2009, p. 338)
- Ineffective text and graphic pairings result from the default for presenting is text. Most users use pictures that only give insight to a portion of the content on the slide not all

Looking back at my past presentations, I have examples of all three offenses.

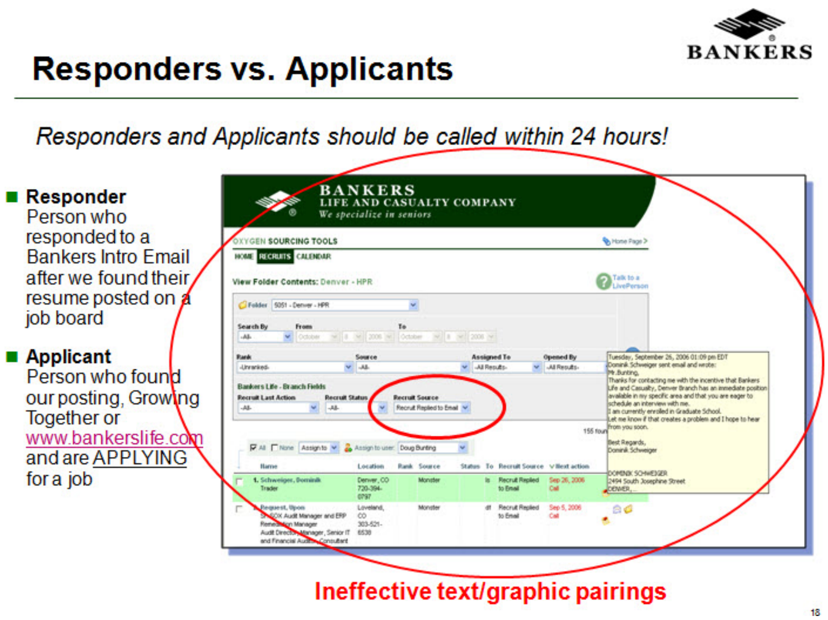
1. Short topic and floating subtopics:



2. Wordy Slides:



3. Ineffective text/graphic pairings – graphic explains only a portion of what's being explained:



Now that I have identified some of the areas that can be improved, based on my research, what is the best way to move forward?

New Direction

How do adults learn?

I have identified in my self-assessment that the techniques I was using prior to entering the MAEA program were limiting in that they encouraged surface learning and did nothing to appeal to the way adults really learn. Kember and Gow (1994) note that meaningful approaches to learning are discouraged when lecturers restrict their lesson plan to simply transferring knowledge. "Such a mindset implies an "empty vessel" model of student learning – attentive minds waiting to receive wisdom poured out from the lecturer's knowledge base" (Kember & Kow, 1994, p.71). Although that may be a convenient format for some teachers to pursue, it actually goes against the natural workings of the brain – in particular the functions that control learning and memory. Our brain sorts information based on whether it is associated with content or context. Content driven information, the "empty vessel" model, is associated with rote learning. This type of learning is harder on the senses because it "is not brain compatible and requires people to employ intense, continuous effort to keep their knowledge fresh. Context-driven learning seems effortless by comparison. This more brain-friendly kind of learning forms quickly, is easily updated, and has almost unlimited capacity" (Hill, 2001, p.75).

So how do adults learn? They are multifaceted, intelligent individuals that are filled with prior experiences, skills and knowledge and must have those factors taken into account when creating a lesson plan. Class time is more productive when the lesson resembles past experiences or a parallel can be drawn from prior knowledge to a new situation. Mackeracher (2004) notes that "adult learning focuses largely on transforming knowledge and skills derived from past experiences" (p. 37). This means that an adult's prior experiences should not be taken for granted and using context-driven facilitation techniques are an excellent way to create a pathway between prior and new knowledge.

Inspiration

When I became interested in training, I was working in insurance so I chose to interview one of my mentors at my previous company. By far John Glick is one of the most interesting, dynamic trainers I have had the privilege to meet. John works for the sales training arm of Bankers called Bankers Learning Network. The Bankers Learning Network (BLN) "was created to foster continuous growth among field personnel through learning, and is coupled with an overriding strategy to provide them with a proven resource to develop personally and professionally throughout their careers" (2002). One of the people helping to bring that to fruition is John.

I started the interview by asking John how he started in insurance/training. John's background is actually quite interesting. He received his teaching degree in Spanish and English from Franklin University in Indiana. Via his studies, he was able to travel abroad through Spain and Europe which eventually landed him a job as European Sales Manager of a furniture company. After different management positions and another stint through Europe, John came back stateside to get his MBA and was presented with an opportunity to go into insurance sales at Bankers. According to John, he was always great at product training which ultimately led him from sales to the training team.

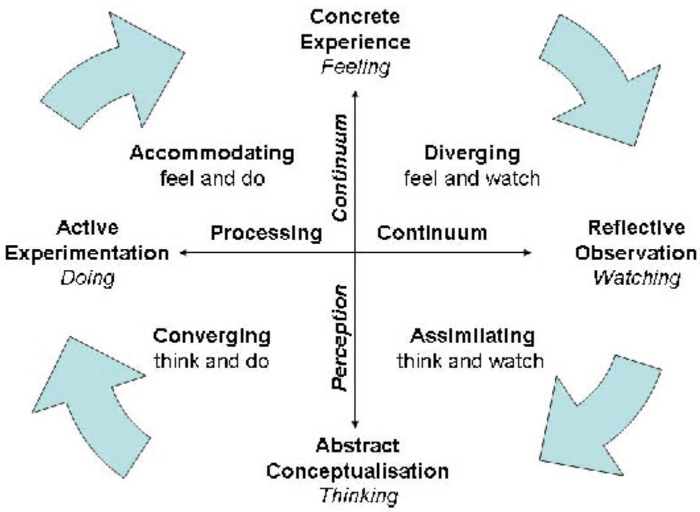
One of the things you instantly see with John is that he is genuinely a people person. He is able to connect with the entire room as if he is having a one-on-one conversation with each of them. One of the techniques he commonly uses to keep learners engaged is humor. According to John, "I use humor not only to help people relax and get comfortable with me and one another, but it's just another personal touch from eye contact to using their names, that shows that my focus is on them and the value they bring to the training" (J. Glick, personal communication, February 6, 2013). Another connection method that John uses is stories. By pulling stories from the audience on how a certain technique or product works in the field, John notes "the story as well as the learner validates the material" (personal communication, February 6, 2013).

Having the ability to "work" a room and connect with learners on a level that makes them know and believe that the information he is providing is true and accurate is John's greatest strength. That characteristic is something I am working to posses in my toolbox as well.

Different Learning Styles

To gain a context- driven facilitation style, I feel it is important to try to tap into the different ways adults receive and process information. Each adult has a preferred strategy and that strategy determines how s/he goes about learning. According to Mackeracher (2004), these strategies can be grouped into learning styles and various authors hold different perceptions – often with little overlap between the models. Due to the variance in models, the phrase "learning styles" can conjure up different references and connotations. Various scholars have tackled this topic and therefore hold different perceptions about what learning strategies are essential.

The number of models doesn't discredit the research that has been done; it just means that the scholars have covered different viewpoints of the same topic. For example, one of the more familiar models was created by David Kolb (1984). Based heavily on how people access information, Kolb divided learners into four categories representing a different types of learning they represent: Convergence (knowledge acquisition by analyzing and applying new concepts); Divergence (knowledge acquisition by intuition); Assimilation (knowledge acquisition via developing theories); and, Accommodation (knowledge acquisition via trial and error) (Rothwell, 2008). The cyclical learning cycle represents the four stages the must occur in order for the most effective learning to take place. See the diagram below:



(Clark, 2004, n.p.)

Another perspective of the learning style moves from how a learner accesses information to how a learner perceives information. Although referred to as a learning style, one author feels the more accurate term for the phrase is perceptual strengths. Rita Dunn, a professor studying "learning styles" for 25 years, feels these strengths also fall into four categories: Visual Learners (those that rely heavily on sight), Auditory Learners (those that rely heavily on sound via listening), Kinesthetic Learners (those that use their entire body via physical movement), and Tactual Learners (those that need to use their hands via their sense of touch) (Filipczak, 1995).

Regardless of which learning styles measure you refer to, authors and researchers agree that by only focusing on one style, the risk of leaving a population of your learners with less understanding increases. The key here is not only being familiar with the multiple ways that adults take in knowledge but how you, the trainer/facilitator takes in information as well. In order for trainers and educators to expand their toolkit, they must first be in tune with their own learning styles. Effective facilitators need to not only be aware of their own learning style, but how that style impacts their facilitating strategies as well as "how learners with similar or different learning styles are affected by [those] facilitating strategies" (Mackeracher, 2004). Facilitators that understand the teaching orientation they typically default to, allows them to not only understand their own approach but also gives them creative liberty to think out the box when expanding their style to teaching and relating to others (Daley, 2003). In other words, trainers must consider other learning styles when designing and delivering training to appeal to learners that vary across the learning spectrum (Rothwell, 2008). By varying the delivery of your message for as many learners as possible, you have better odds of everyone understanding and retaining the lesson.

Narration in Training

As noted earlier, when addressing adult learners it is helpful for a facilitator or trainer to appeal to an adult's prior knowledge. Especially critical in training situations, prior knowledge is the connection between an old process and the new way of doing things. Adults bring a plethora of experience to a learning situation and that experience can be used as a shared resource for the other learners present. By drawing on that experience, it can make the lesson for the adult more applicable. A good bridge between the prior experience in the room and the lesson at hand is narration. According to Rossiter (1999), narrative is a powerful tool because it "is a central structure in human meaning making" (p.59).

Narratives in the class are useful because they allow the learner to store and describe information for which no clearly defined propositional knowledge is available (Mackaracher, 2004). In most corporate or training environments, little may be known why a process is changing other than it being a directive from upper management. The ability to lead into a lesson with very little background into why a change is being made is one of the abilities that narratives provide. Instead of associating the change with why it is being made, one can instead lead with a story that depicts the possible good that the change has provided others in similar situations as those being trained. Rossitter (1999) notes that "it is through narrative that people renegotiate meaning of what is out of the ordinary. In this renegotiation, one's story is enlarged so as to include unanticipated events, inexplicable happenings, or contradictory perspectives" (p. 68).

Stories have been used for centuries to pass on lessons and lore. The reason narratives are so successful is because they encompass a three step process – hearing, telling, and recognition. Narratives function on three levels (Clark & Rossiter, 2008):

- Reception – The story is heard by the listener which requires that it be received and interpreted
- Broadcast – A reciprocal story within the same theoretical framework is told by the listener which signifies that a new learning connection has been made
- Recognition – "It presumes that learners begin to understand the fundamental narrative character of experience. As they gain understanding, they also begin to understand that they themselves are narratively constituted and narratively positioned… (p. 65)

There are several methods in which narrative can be incorporated into adult learning. The most common form of narrative lesson planning is known as instructional case studies. The case would be an example, real or fictional, using a typical story setup that presents an issue that must be resolved in real-time. This technique is helpful to have in one's trainer's toolkit because the participants are "learning to think like practitioners, which involves putting theoretical concepts in conversation with prior experience to come up with new insights and interpretations (Clark & Rossiter, 2008, p. 68).

NLP/4MAT

It is important to engage adult learners not only by appealing to their learning styles but also catering the message to those styles. There is a presentation format used in Neuro-Lingustic Programming (NLP) which I think is very efficient at tying learning styles with the message. Before I discuss the format, I will provide some background about NLP. NLP is an approach to language teaching that works to boost learner performance. NLP was developed by a student/professor duo, Richard Bandler and John Grinder, out of U of C – Santa Cruz in the '70s. The model demonstrates "that a person is a whole mind-body system with consistent and patterned connections between neurological processes (**n**euro), language (**l**inguistic), and learned behavior strategies (**p**rogramming)" (Dilts, Grinder, Bandler, & DeLozier, 1980, p.2). The model has been widely used in UK in education as well as being recognized as a mode of psychotherapy. NLP offers a plethora of techniques and frameworks that can be applied to virtually any aspect of learning or teaching. Examples range from classroom management, presentation skills, teaching design, (Tosey & Mathison, 2010). Ultimately, NLP is a communication tool that challenges you to be more in tune with the learners via physical and verbal queues. A few techniques include:

- Rapport building – creating interpersonal contact through communication via empathy, support, and interaction
- Modeling – the offering of different strategies to achieve desired results
- Filtering – Monitoring correct/incorrect responses
- Reframing – replacing unproductive teaching strategies w/ better alternatives to improve learning
- Anchoring – reinforcing achievement by emphasizing success

(Millrood, 2004, p. 30)

Great at relationship building, NLP works to get the learner comfortable by first gaining interest in the subject matter being presented via the presenter, then building the information in layers so that it can be absorbed by the many learning styles that exist in the environment. One format used by NLP practitioners is the 4MAT learning system. Representative of what Kolb referred to as integrated learning, 4MAT is a cyclical that takes learners though the following learning styles: Imaginative Learners (learn through experience), Analytic Learners (logical, organized learners), Common Sense Learners (practical application learners), and Dynamic Learners (active learners) (Nicoll-Senft & Seider, 2010). Although similar to other four - factor models, (see the chart below) 4MAT also provides a system of what questions apply to what type of learner.

4MAT	**Kolb**	**Honey and Mumford**	**Jung**
Why? (Imaginative)	Abstract	Reflector	Introvert
What? (Analytic)	Concrete experience	Activist	Extrovert
How? (Common Sense)	Active experimentation	Pragmatist	Feeler
What if? (Dynamic)	Reflective observation	Theorist	Thinker

(Bull, 2010, n.p.)

So for every major section of learning, the facilitator should incorporate the following formula:

1. Introduce the topic and say **why** you would want to know this
2. Next, give the information and explain, this is **what** you do and **what** it looks like

3. Have students learn/experiment with **how** to do it in different contexts
4. Finally reassemble and tell them **what will happen if** being used in a real life scenario

Following the process keeps the learners engaged as well as appealing to multiple learning styles (Bull, 2010, n.p.).

Act on Evidence

Since I am still not in a role where I can fully implement my findings, I have decided to refresh an old training with my new knowledge.

Incorporate:

- A Symphony Chart template
    - Adaptable to multiple training topics that can be used as a guideline for trainings in corporate settings
    - Adaptable to different time formats (Short - 1hour, Med - ½ day)
    - Incorporates activities for different learning styles
    - Uses storytelling to convey message as well as build rapport with the learners

Improve:

- My current presentation/facilitation style
    - Reduce wordy and improperly configured slides on Power Point
    - Reduce heavy reliance on transmission communication style
    - Increase ability to weave in stories into lesson plans for added knowledge transfer

Evidence will include: A blank symphony chart, a chart filled out for a short lesson, a chart the medium length lesson, the original power point for the lesson, and the updated power point lesson.

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Appendix A

Blank Symphony Chart

Symphony Chart for: ______________________________

Rational Objective	Experiential Objective	Space Arrangement	Materials

PRELUDE	MOVEMENTS			POSTLUDE
	I **Theme:**	II **Theme:**	III **Theme:**	
Time:				

Multiple Intelligences: Logical/Mathematical ♦ Verbal/Linguistic ♦ Body/Kinesthetic ♦ Visual/Spatial ♦ Musical/Rhythmic ♦ Interpersonal ♦ Intrapersonal
Learning Cycle: Divergence ♦ Assimilation ♦ Convergence ♦ Accommodation
4MAT: Why? What? How? What if?

Appendix B

A Symphony Chart for a One Hour Lesson

Symphony Chart for: _____Recruiting Manager: Manager Role (1 hour)___________________________________

Rational Objective	Experiential Objective	Space Arrangement	Materials
A clear understanding of what the Recruiting Manager is; why it is needed; and how to use it.	Hands-on demonstration of the ability of the Recruiting Manager.	Sit where everyone will have a clear view of the projector screen and board/notepad. They'll also be working on laptops	Job aid of Recruiting Manager and handout of presentation in notes format (three slides per page w/ lines next to each slide).

PRELUDE	MOVEMENTS			POSTLUDE
	I **Theme**:	II **Theme**:	III **Theme**:	
There are mostly new managers w/ the company present. How comfortable do you feel managing the process? *Note responses on a board or large notepad and refer back to any pain points towards the end to ensure they have been covered.*	**Recruiting Manager Intro** *Introduce story about the new Branch Sales Manager (BSM) and the trials and tribulations of managing recruiting and other duties.* Why the change; why it's beneficial; (Slides 3-5) For diverger – seeks meaning and needs to know involved. Learns best by listening and sharing ideas. *Be sure to walk around the room avoiding walking across projector screen and to make eye contact.*	**Reports/Accountability** *Continue story of how new BSM had troubles tracking productivity of recruiters. In the story, give examples of how these reports are used by BSM* What's offered – reporting capability (slides 7-17) For assimilators – learns best by thinking though ideas.	**How it works/Demo** Explain how it works (slide 19) (approx 2-5 min) Demo specific scenarios addressing biggest pain point discussed earlier (approx. 5-10 min) Divide class into group of two's to complete a hypothetical exercise (approx. 10 min) For convergers – seeks usability and needs to know how it works. For accommodators – learns best via trial and error	**Wrap-up** *Conclude story of BSM now using Recruiting Manager and how it improves his/her productivity, tracking ability, and reduced clutter.* Review how tool can fix pain points noted in the beginning – check off board. Final questions? (Slide 21) Resources for help (Slide 22)
Time: 5 min	10 min	15 min	20-25 min	5-10 min

Multiple Intelligences: Logical/Mathematical ♦ Verbal/Linguistic ♦ Body/Kinesthetic ♦ Visual/Spatial ♦ Musical/Rhythmic ♦ Interpersonal ♦ Intrapersonal
Learning Cycle: Divergence ♦ Assimilation ♦ Convergence ♦ Accommodation
4MAT: Why? What? How? What if?

Appendix C

A Symphony Chart for a Four Hour Lesson

Symphony Chart for: ____Recruiting Manager: The Manager's Role (4 hours)________________

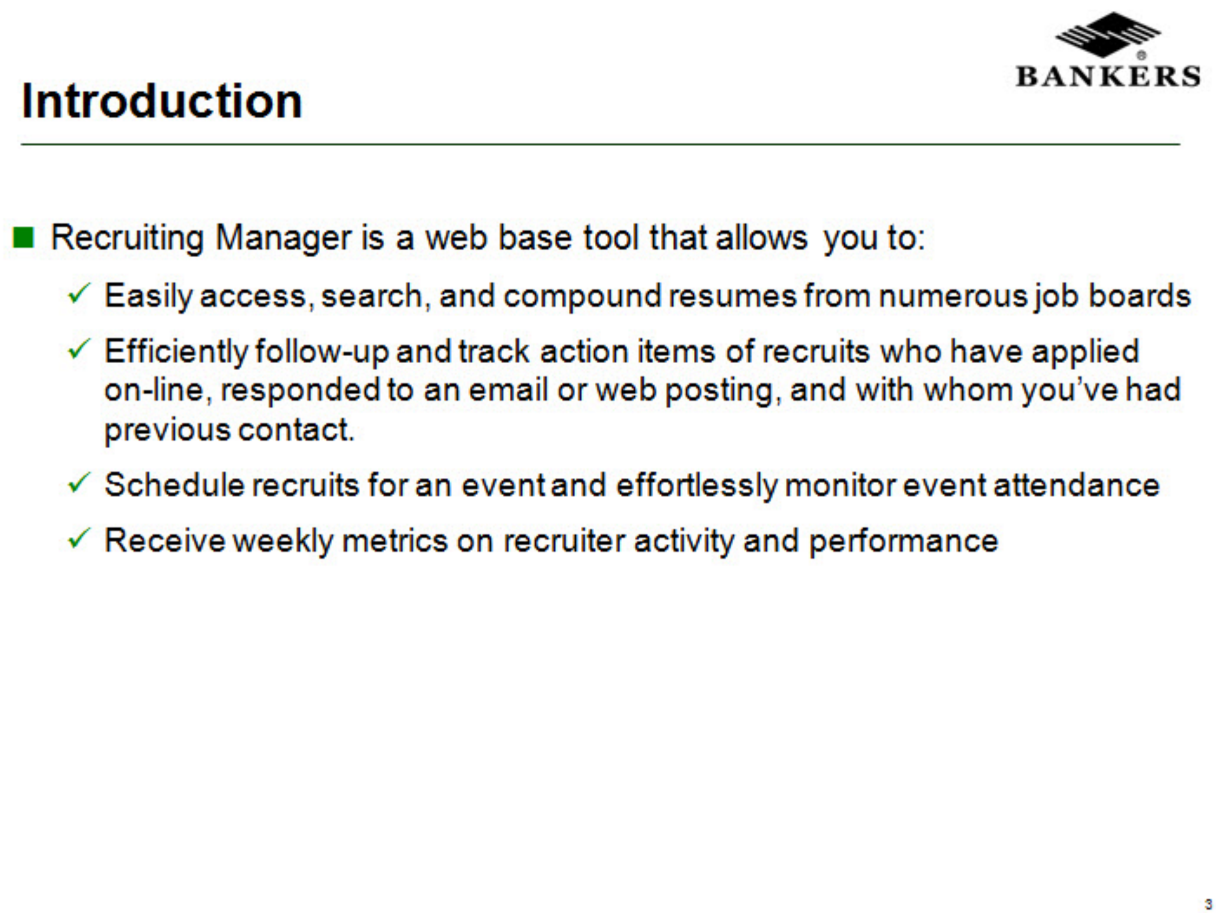
Rational Objective	Experiential Objective	Space Arrangement	Materials
A clear understanding of what the Recruiting Manager is; why it is needed; and how to use it.	Hands-on demonstration of the ability of the Recruiting Manager.	Sit where everyone will have a clear view of the projector screen and board/notepad. They'll also be working on laptops	Job aid of Recruiting Manager and handout of presentation in notes format (three slides per page w/ lines next to each slide).

PRELUDE	MOVEMENTS			POSTLUDE
	I **Theme:**	II **Theme:**	III **Theme:**	
There are mostly new managers w/ the company present. *Ice breakers (30-45 min/teams – 2/3) -* **Name Game* **$86,400 - Deals with efficiency or time management; Each group come up with ideas on how to spend $86,400 within 24 hours.* Recruiting Pain points? *Note responses on a board or large notepad and refer back to any pain points towards the end to ensure they have been covered.*	**Recruiting Manager Intro** *Introduce story about the new Branch Sales Manager (BSM) and trials and tribulations of managing recruiting and other duties with similar pain points.* Exercise: Create current recruiting schedules/discuss (30 min) Why the change; why it's beneficial; (Slides 3-5) (15min) For diverger – seeks meaning and needs to know involved. Learns best by listening and sharing ideas. *Be sure to walk around the room avoiding walking across projector screen and to make eye contact.*	**Reports/Accountability** *Continue story of how new BSM had troubles tracking productivity of recruiters.* Discussion: How is recruiter tracking currently done? (15-20 min) What's offered – reporting capability (slides 7-17) (15 – 20 min) *Continue the story, give examples of how these reports are used by BSM – best practices* For assimilators – learns best by thinking though ideas. **15min – Bio break**	**How it works/Demo** Explain how it works (slide 19) (approx 2-5 min) Demo specific scenarios addressing biggest pain point discussed earlier (approx. 20 min) Divide class into group of two's to complete a hypothetical exercise (approx. 20 min) For convergers – seeks usability and needs to know how it works. For accommodators – learns best via trial and error	**Wrap-up** *Conclude story of BSM now using Recruiting Manager and how it improves his/her productivity, tracking ability, and reduced clutter.* Review how tool can fix pain points noted in the beginning – check off board. Final questions? (Slide 21) Resources for help (Slide 22)
Time: 1 hour	1 hr	1 hr	45 min	15 min

Multiple Intelligences: Logical/Mathematical ♦ Verbal/Linguistic ♦ Body/Kinesthetic ♦ Visual/Spatial ♦ Musical/Rhythmic ♦ Interpersonal ♦ Intrapersonal
Learning Cycle: Divergence ♦ Assimilation ♦ Convergence ♦ Accommodation
4MAT: Why? What? How? What if?

Appendix D

Example of Old Power Point Format



Appendix E

Example of New Power Point Format

Recruiting Manager is a web base tool allowing you control all your recruiting needs

BANKERS

Schedule recruits for an event and effortlessly monitor event attendance

Receive weekly metrics on recruiter activity and performance

5