

Conducting Successful Training Events and Meetings

By Mike DuBose, MSW

I. Preparing for Success

Introduction

How do you stand in front of a group of intelligent adults from various backgrounds and gain their respect, hold their attention, and enthusiastically engage them in discussions and activities?

After training thousands of individuals in hundreds of workshops—some met with roaring success and others filled with more blunders than I care to remember, I want to share some practices and tips that have helped our two companies, Research Associates and Columbia Conference Center, achieve consistent ratings of good and outstanding in our course evaluations and convention services.

Let me begin by starting at the beginning with the preparation needed to ensure engaging and enjoyable training sessions. Then, I'll provide some guidelines for workshop leaders. And finally, I'll talk about the potential for the “laying of the proverbial egg” that can result from a lack of proper planning for the components that involve participants' impossible-to-predict input and response.

Trainer Quality

Adult learners are demanding and have little patience with boring, stilted, and unprepared presentations and those who deliver them. In the past, I have hired individuals, thinking they would make excellent trainers because of their relevant experience, knowledge of the subject matter, and observed interactions with others. But when I put those individuals before a group of people, it was obvious their engaging personalities did not necessarily translate to an ability to capture and hold their audience's attention or teach the skills training participants paid money to learn!

After many bungled presentations, I look for energetic, positive, articulate, and modest individuals who can adapt their presentations to various adult learning styles, both as individuals and in groups, and who can convey information in a manner that leads to customers acquiring the skills they came to get in the first place! Before signing on with a trainer, I watch them in action a few times and check their references, always remembering that they represent the company and its standards for high quality. We simply cannot afford to make a mistake in choosing the right presenter!

Training Environment

The best trainer in the world will have a difficult time engaging an audience if the training environment is inferior (i.e., too small, dim lighting, poor audiovisual support, etc.). Recently, we published a *Facility Comparison Guide* to assist meeting and event planners in selecting a facility that best meets their needs. While the guide may be accessed at www.columbiameetings.com (look under RESOURCES), here are a few tips to guide you in creating a training environment that is second to none.

■ **Site selection.** Before we choose a training site, we outline detailed specifications for our room set-up, audiovisual needs, catering, and other requirements. These details help the site staff clearly understand exactly what we are looking for and ensure we will not be assigned a room that is

inappropriate for training purposes. We *always* make an onsite inspection of the facility before signing a contract—we have seen some sites that looked picture-perfect on the facility’s website, only to find that pictures don’t always paint a thousand words! It’s the dirty and uncomfortable chairs, non-operational heating and cooling systems, and rude staff that paint the real picture!

■ **Space requirements.** Have you ever noticed that people who go to theaters, meetings, and other large public gathering places often put their personal items in the seat or space next to them? Most of us, without even realizing it, establish our own personal space, and we want a little bit between us and the person seated next to us.

In training environments, overcrowding people will most likely irritate them and set the tone for a poor training experience before the presenter has spoken the first word. Consequently, packing adults into a space barely large enough for a toddler has a negative effect on learning outcomes. And it doesn’t do much for your participant evaluations either.

■ **Seating.** Again, it’s important to test seating arrangements to ensure that participants are not too crowded. We check the area where the tables connect (nobody likes to straddle a table leg), ensure there is sufficient leg room, and position tables and chairs so that participants can enter and exit their chosen seat without stumbling over everybody else seated around them. We also allow adequate space between rows and position aisles to give everyone the sense that no one is invading their personal space. We position water stations in the rear of the room—not on the participant tables where accidental spills can, and often do, occur.

■ **Presenter area.** A good trainer never stands behind a podium to deliver their knowledge and expertise. There must be sufficient room for the presenter to move around and interact with participants. Also, when establishing the trainer’s presentation area, take into account the space that will be occupied by the audiovisual equipment.

■ **Room temperature.** When a room is too hot or too cold, training participants simply do not concentrate on the workshop content. Temperature affects the mood—and hence the course evaluations—of training participants. We shoot for a constant room temperature of 71 degrees, but the humidity level often impacts whether this setting is too hot or too cold (high humidity makes people feel warmer; low humidity, cooler). Because it is impossible to please everyone, our pre-registration information encourages attendees to bring an extra layer of clothing that can be easily added or removed when a participant becomes uncomfortable.

At the beginning of a workshop, we ask participants to notify us if the temperature is uncomfortable. If there is a general agreement among the class, we ask the facility manager to adjust the temperature up or down. In addition, both our trainer in the front of the room and staff assistants stationed at the back of the room carry a monitoring device to ensure that the temperature doesn’t fluctuate from Arctic ice to Hades hot! These devices are available at most Radio Shacks.

However, remember one important thing – you cannot please everyone!

■ **First impressions:** The participants’ mood is key to how they receive the training you deliver. When participants first enter the training room, we try to create a positive and relaxed atmosphere by playing soothing music and displaying photographs that conjure tranquil images. Recently, we published a DVD of over 300 scenic beaches and sunsets contributed from the world travelers’

favorites among our staff. To purchase this CD, visit our website at www.grantexperts.com and select PRODUCTS.

Organized Pre-registration and Registration

Research Associates pre-registers participants the day before the workshop to enable them to check in and pick up name tags, curriculum, and other workshop materials. This early check-in allows participants to ask questions about the workshop logistics, enables our staff to set a friendly tone before the workshop even begins, and reduces bottlenecks on the day of training. Research indicates that a customer forms a perception of you or your organization within eight seconds. To make those eight seconds count, encourage all staff to smile, even in the midst of stress and confusion. A smile and a positive attitude go a long way to diffuse a negative situation or enhance a typical one. Remember: The goal is 100% participant satisfaction, and positive first impressions are a key step in achieving this goal.

■ **Pre-registration.** Pre-registration response by our staff must be timely and accurate. Accurate billing, detailed directions to the site (preferably with landmarks), and other information ensure that participants show up in a good mood. If people are upset when they arrive for a workshop, you have an immediate obstacle to overcome. And if only one other person overhears an irate individual's tirade about something you did wrong, their irritation quickly spreads to others.

■ **On-site registration.** The best training can be ruined by a confusing registration process, rude staff, name tags with incorrect or misspelled names, billing errors, etc. Here are some helpful tips to facilitate the registration process and start early to set the right mood:

1. Station competent and informed staff at the registration table.
2. In hotel settings, display directional signs to guide participants to the training room.
3. Alphabetize and separate name tags into two groups: those who have paid and those who need to pay. The latter can be guided to a designated staff member to avoid holding up the line. Distribute curriculum and other materials only to participants who have paid.
4. Hold a one-hour registration the night before to reduce bottlenecks on training day.

Workshop Supplies

High-quality materials and communications are important in conveying a professional image to our participants.

■ **Name tags.** We use large name tags that can be worn on a chain as a lanyard or attached to the participant's clothing with a bulldog clip. The participant's first name is printed in a larger font to enable the trainer—and other participants—to call people by their first names to enhance bonding.

■ **Curriculum.** Our curriculum is distributed in correctly sized, three-ring binders, complete with a professional cover and inside pockets for additional handouts. Slides refer to page numbers so participants can reference the relevant, more detailed curriculum content.

■ **Certificates.** When participants complete their training, we provide them with a professional certificate which can be framed and displayed.

■ **Participant list.** While we do not sell participant contact information—and we let individuals know this when they register—we do distribute a list of all attendees that identifies the organization

they represent and their contact information. The list facilitates networking and lets everyone know a little bit about their fellow classmates. We also encourage trainers to review the list before the session so they can get to know their audience a little better and mention agencies by name to show a personal interest in their students.

Refreshments

We provide a variety of beverages and other refreshments three times a day, before and during workshop sessions. The intent is to treat our participants like friends and relatives—the way we would treat guests in our own homes. However, the choice of refreshments also has an impact on the learning environment, so too much or too little can affect how the participant receives your workshop. High carbohydrate foods and heavy meals make participants sluggish. We once served turkey and dressing for lunch, and you never saw so many fluttering eyelids and nodding heads!

Trainer Support Staff

Depending on workshop size, we provide our trainers with one or more assistants to help with environmental and logistical issues and monitor participant needs. To keep things running smoothly, the trainer and assistant, seated in the back of the room, communicate through a set of pre-established signals or verbal requests. Some examples of communication needs might include:

- contact facility staff if the trainer indicates an uncomfortable room temperature (*signal*: a quick fan of the face or a shivering body hug);
- remind the trainer to repeat participants' questions (*signal*: cupping his/her ears);
- monitor stretch breaks, alerting the trainer if participants begin to drift (*signal*: standing up and stretching);
- signal the trainer for start and stop times and refreshment breaks (*signal*: pointing to his/her watch); and
- take notes for the trainer and record participants' unanswered questions that require follow up.

As a side note, if a problem does arise, participants should never witness disagreement or arguments between the trainer and assistant. Any debate should be handled privately so that workshop participants see a harmonious, unified training team.

II. Guidelines for Trainers

- 1. Know your subject area.** Prior to leading any workshop, review your materials and know your curriculum and topic well. You must never be less informed than your audience. If you are weak in a particular area, talk to experts or read up on the subject.
- 2. Know your audience.** We always pre-assess the level of expertise among participants and provide a written overview to our trainers before the workshop. If the group consists of both novices and more experienced individuals, be sure to acknowledge that there are differences and encourage the more knowledgeable individuals to ask the questions they want answered so they feel they obtained value for their registration costs. Also, remember that novices may feel insecure and hesitant to ask questions. We

encourage trainers to hold a 30-minute session for novices after class to ensure they understand the course content and to reassure them that there are no stupid questions.

3. Have backup. We always have a second laptop, microphone, and LCD projector bulb on hand in case of technical difficulties. Bring these items, and a CD backup of the PowerPoint presentation (files can and often do corrupt), in carry-on luggage.

4. Respect Murphy's Law. In approaching any training situation, it helps to keep Murphy's Law in mind: If anything can go wrong, it will—eventually. The best trainers are “over-planners”. They practice the theory of my very wise grandmother: “Hope for the best, but prepare for the worst!” If you anticipate the unexpected, problems are less likely to cause panic.

On September 11, 2001, when terrorists' planes crashed into the World Trade Center towers, I was just one-hour into a week-long training for a group of 125 adults in Austin, Texas. Fortunately, by remaining calm and adapting to the situation and needs of the participants (in spite of others' misgivings), I was able to continue the five-day training event with most of the class intact.

When something goes wrong, keep a positive attitude and a calm head. Remember that you are the leader for the group, and participants will emulate your behavior. Even if you are shaking in your boots, try to appear calm, cool, collected, and in control!

5. Arrive early. Trainers should arrive at the training site at least one day, and preferably two, before a workshop begins, allowing time to unwind, rest, review, and ensure proper setup. The night before, get to bed early and avoid excessive eating and drinking. By arriving early, you also account for travel delays, and when you stand before your eager participants, your body and mind will be in tip-top shape.

6. Test everything the night before and again before class begins. Always test your audiovisual equipment and any other technology or equipment you plan to use. Set the audio a little louder when the room is empty since bodies in the room tend to absorb sound.

Be sure to position your projection screen away from ceiling lights that are too bright and can dim the contrast and sharpness of your slides. We usually ask facility staff to disengage the fluorescent bulbs directly over our screen so we can obtain maximum picture quality.

7. Dress professionally. Personal appearance creates an impression and projects credibility. Training staff should look professional and wear colors that are pleasing to the eye. Avoid loud or outdated fashion trends. Women should wear make-up and appropriate accessories (scarves and jewelry), while men should wear blue or dark suits with a brighter colored tie. Since I teach techniques for applying for government grants and funds, I typically wear a money-adorned tie with a blue, pin-striped suit on the first day of

a course. On subsequent days, once I have established myself as a professional, I usually dress down to some degree in my favorite Hawaiian shirts, making the mood a little less formal and allowing the participants to see the “real” me.

Remember to wear something that enables you to clip a wireless or other attached microphone to your clothing, positioned so that your voice is readily picked up by the sound equipment. Unless you have access to some awfully sophisticated equipment, the microphone must be positioned about 6” to 8” directly under your mouth so that turning your head in the opposite direction of the microphone doesn’t result in a faded voice projection.

8. Mingle. When possible, trainers should walk around the room before the workshop starts, smiling, talking, and making visual contact with participants. Scan name tags, taking note of participants’ first names.

9. Start promptly. Not starting on time is one of the most common complaints we receive, and one that lowers participant satisfaction. People often rush to arrive at your workshop on time and will be annoyed if you wait for latecomers. Fill the first few minutes of the workshop with some general information and housekeeping that late participants can miss without losing valuable content and start exactly at the advertised time. Of course, if a traffic jam or other problem delays the arrival of half the class, announce the problem and start a little later.

Timely breaks and endings of workshops are also key to a pleasant training experience. After experiencing some problems getting everyone back from breaks, we now hold drawings and award prizes only to those who are seated and wearing their name tags. This strategy works like a charm to keep our agenda on track!

10. Establish credibility. At the beginning of a workshop, always introduce yourself and establish your credentials without bragging. For example, our 20-year success rate in obtaining government grants is 90%. That fact, along with some information about the company, helps establish my credibility. At the same time, I also let people know I have made mistakes but have learned from them. Thus, I am teaching them some of the lessons I’ve gained through experience.

Never tell participants that you are a new trainer, have never taught a certain part of the curriculum, that the curriculum is new, etc. These things are better left unsaid since they may result in participants’ belief that they’ve paid for a workshop that is nothing more than a trial run.

- 11. Give frequent, short breaks.** Many people will not take a break until they are given permission to do so. We recommend 5-minute stretch breaks each hour while you show cartoons, a 15-minute break at 10:00 AM, a 75-minute lunch break at 11:45 AM, and a 15-minute break at 2:00 PM. One of my most memorable training experiences resulted in a forgotten afternoon break when a large man sitting near the front of the room began to roll his eyes and eventually fell into a deep sleep. My first thought was that he had paid his money for the class, so if he wanted to sleep, that was his prerogative. But then he began to snore—loudly!
- 12. Begin and end breaks promptly.** Participants who ask questions during the break can delay restarting on time. Set a timer to signify that break time is over, or specify an odd break interval since people tend to pay more attention to something out of the ordinary. For example, at 10:13 AM, ask people to return at 10:28 AM. Trainers may also use their LCD projectors to display the countdown on a large overhead screen until the end of the break
- 13. Develop an interesting training style.** Although a trainer may be comfortable shielded by a dais, nothing is worse than standing behind a podium and lecturing all day, hypnotizing the audience by forcing them to focus on one position for too long. The best instructors “work the crowd,” moving around the room; gesturing; calling participants by name; and constantly scanning the room to acknowledge participants in all seats. They tell proven jokes or interesting and relevant stories that do not offend. They also incorporate useful teaching aids, such as PowerPoint slides and handouts. They keep sessions moving by alternating lecture with question and answer periods, assignments, group activities, and panel discussions.
- I usually mark my PowerPoint slides in my instructor’s guide with a big, red asterisk to alert me when to change slides. Often, I put a purple asterisk on certain pages to remind me to step from behind the podium. I have found that people want to be educated and entertained: they want to laugh and have a good time. Thus, the successful trainer has to be motivating, humorous, knowledgeable, energetic, and engaging!
- 14. End each workshop on a good note.** Never rush the end of your training, even if you are running over time or people need to catch a plane. Always thank participants for coming. Participants’ sincere applause indicates a job well done!

15. Encourage participants to evaluate the workshop.

Always ask participants to complete an evaluation, telling them how important their critiques are to improving the quality of future trainings. Let them know that your training staff reviews their ratings and comments, analyzing all complaints, recommendations, and weaknesses with a receptive attitude. While comments may be painful to read, we operate from a Total Quality Management (TQM) model where our goal is 100% participant satisfaction. At the end of each day, we encourage our trainer and support staff to debrief by reviewing the day's events, discussing what went right; what didn't; "problem" customers that need some TLC; etc. Staff members also keep notes on issues, and these are discussed on our home turf at follow-up meetings. Then, we send a follow-up mailing, reporting our ratings and identified issues so that participants know that we heard their concerns and are addressing them.

While we will don't receive perfect scores every time, that doesn't keep us from striving for the gold! With a goal of perfection, success is attainable since over half our workshop participants, grants development clients, and convention center customers come to us by word-of-mouth.

III. Areas That Require Special Attention

Question and Answer Periods

Answering questions is an important part of training but is not always easy to handle in a group situation. The following recommendations have helped our firm make these activities a successful part of our workshops:

1. Take questions only at section breaks or when you see people's interest begin to wane. Tell participants at the beginning of every session, with a smile, to ask questions only at the designated time and to limit their questions to one per Q&A period.
2. Have printed question cards on hand and encourage people to write their questions down and put them in a designated box. Answer these questions first. We have found that many participants will not ask questions out loud, but will submit them on cards.
3. Don't let people blurt out questions and control the session. Participants want their instructor to be in control. Remember, however, that people who ask frequent questions or try to interrupt need to be acknowledged. Tell them pleasantly you will take questions or comments shortly. This polite instruction usually creates the diversion you need to gain control of the group.
4. If you don't know an answer to a participant's question, don't bluff. An incorrect answer jeopardizes your credibility. If you cannot answer a question, tell the participant you need to think about the question or that you will address their topic later. We ask our stumped trainers to call me for help so they can present the response later in the day. Another option is to try to find someone in the workshop who might have the answer to your question by saying something like this: "Since I've been answering questions all day, would someone else like to address this one?" In a group of some size, someone will often have the answer. Finally, if you don't see any other option, simply say, "I don't know, but I will find out and let you know later today." Then, remember to deliver on that promise!

5. Often people want to precede a question with a long explanation, so encourage participants to ask questions quickly (i.e., get to the point). Remind them that you want to answer as many questions as possible and maintain the advertised workshop schedule.
6. If your group is large, repeat each question so everyone hears both sides of the exchange. Ask people to stand when asking their question, which not only improves delivery but can often limit the number of questions. If you opt to use this strategy, however, be conscious of individuals with disabilities.
7. Be prepared for the “know-it-alls.” Some people just like to hear themselves talk! Know-it-alls usually have low self-concepts, although you would never know it! They often challenge and publicly attack the trainer’s credibility. While this particular personality type can be threatening, we continually remind our course participants that there are many different ways to write grants, and we are presenting our methods which have been highly successful for us. Since the know-it-all’s ego must be addressed and recognized, we often place this person on a panel and let him/her talk in a more controlled setting rather than trying to control the class, especially if the person appears competent and can add to the workshop’s quality. We also ask the know-it-alls what they think about a certain situation or to relay their experiences in an area under discussion. As with questions, remind the class that you want to stay on schedule and suggest they write their comments on the question cards for later discussion. However, be careful not to do this right after someone blurts out or tries to control. Even though your patience may be wearing thin, there’s no need to offend the offensive!
8. Show respect for everyone! Some of the novices may want to dominate your sessions by asking too many questions or making statements that others might consider foolish, irrelevant, or erroneous. Respond respectfully and tactfully and acknowledge such a comment by saying that it represents one point of view, reiterating that the workshop is based on successful techniques. If questions continue, offer to stay after class for a one-on-one or small group session.

Panel Discussions

Generally a panel discussion consists of a group of individuals who discuss or respond to questions posed to them by a facilitator. Afterward, panelists may field audience questions.

If you integrate a panel discussion into your training session, establish some rules upfront for panelists and the audience to keep the discussion on track and on time. For example:

1. Set time limits for the panel discussion and for audience questions.
2. Indicate that you are the facilitator and that you will ask the questions.
3. Tell the panelists they have 5 minutes each to present his/her views.
4. Repeat the 5-minute rule several times to remind the panel and the audience of the time limit.
5. Let the panelists know in advance what you plan to ask and allow time for them to gather their thoughts and make notes.
6. Establish a signal for alerting panelists when they are nearing the 5-minute limit. I usually walk towards them to signify their time is up.

Selling Products and Services

Nothing annoys participants more than feeling the trainer has violated their trust by trying to sell something while training. We encourage our trainers to briefly advise workshop participants of our various products (e.g., we use this product to develop job descriptions, etc.) but we do not practice direct sales in the context of class instruction. We had some past complaints around this issue, but they have all but vanished in recent years. If you must sell, do it briefly and keep the main thing, the main thing. Participants came to hear a presentation—not a sales pitch!

Use of Jokes and Stories

Most participants want to be entertained when they come to our workshops. Learning combined with humor and fun helps participants retain knowledge and results in more satisfied participants. I combine my teaching with humorous true stories and jokes, using Farside and Herman cartoons in our workshops. View your cartoons, stories, and jokes with a critical eye, however. What you find comical, others may view as offensive. To be sensitive to the feelings of all types of participants, ask individuals from different races, genders, ages, and ethnic groups to review your jokes; don't allow a person with dry humor to select your jokes—very few people will get the punch line; ask several people to rate your jokes for humor. Finally, if you use a joke, cartoon, or story and it doesn't work after several tries, pitch it.

Conclusion

Our goal for our training at Research Associates is to hear departing participants say: “That workshop was well worth the money! I learned a lot; ate well, and had fun!” If you can attain this level of participant satisfaction, you are on the path to a successful training career! Happy training!

The philosophies outlined in this article are used in coordinating our grants training participants and in serving convention, meeting, and event clientele. We hope this article provides meeting planners and trainers with insight into how to make their events more successful.

To learn more about the companies featured in this article, go to our Research Associates website at www.grantexperts.com and see our own convention center at www.columbiameetings.com.

About the Author: Mike DuBose, MSW is President and owner of Research Associates, a 20-year-old company that has trained over 20,000 individuals and professionals in a wide range of subjects. Over his career, he has identified many secrets in what it takes to conduct successful trainings and meetings.

Many of Mike's lessons learned since he began his training career in 1985 have been incorporated into the design and function of his newest venture, Columbia Conference Center. The convention center is a 40,000-square-foot, state-of-the art meeting facility located between Columbia and Irmo, SC.

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