

Preparing a Training Outline Activity

Directions: Given the following scenario, the preceptor will facilitate the steps for the surveyor to complete the training outline activity.

Scenario

Your neighbor is going to interview for a job in a city 800 miles away. She is planning to drive to the interview. While talking about her upcoming trip with her, you learn that she has never changed a tire and she wants to learn this skill before leaving home. You tell her you would be happy to teach her the proper and safe way to change a tire.

Task: Develop a training outline for changing a tire.

A training outline is a set of instructions and considerations that help you teach your neighbor. The purpose of the training outline is to help YOU teach the task of changing a tire. Note that evaluation, including offering feedback, is an important part of teaching.

Part I—Job Steps

Directions: Make a list of steps for changing a tire.

Brainstorm all the steps that might be involved in teaching your neighbor how to change a tire. Do not worry about the order of the steps. Choose one of the group members to make a list of the steps that the group identifies and another member to present the list to the class.

List of steps:

Each team will report their list to the class.

Part II—Task Group and Order of Steps

Directions: Put the steps into a logical order that you think would make sense while teaching this task. Organize the list of steps into practical groups. For example, put together all the steps needed to park the car. Follow this example for organizing your steps. Use the following form to write up your groups and steps.

Table 1. Task Group and Job Steps

Task Group	Job Steps and Sub-Steps
Prepare	Find a location to pull off the road.
	Exit car.
	Turn off ignition.
	Set the parking brake.

Each team will report their outline to the class. Teams may change their outlines after the reports are given.

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Directions: Use the form to write up your groups and steps.

Job: _____

Task Group	Job Steps and Sub-Steps	Coaching Considerations

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Part III—Important Considerations

Have the team examine each step to determine the considerations you need to demonstrate or mention as you teach.

Directions: Add considerations to the table you started in Part II of this activity.

Job: Change a tire.

Table 2. Task Group, Job Steps, and Coaching Considerations

Task Group	Job Steps and Sub-Steps	Coaching Considerations
Prepare	Find a location to pull off the road.	Assess the width of the shoulder. Determine if the area is level. Choose a location that is away from traffic.
Prepare	Exit car. Turn off ignition.	Watch for traffic. Take your keys with you.

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Practice Coaching Activity

Changing a tire is a skill. You can use the same system to teach any skill.

As a class, select three simple jobs or parts of a job to be taught. In teams of three, have each person select a different job.

Each person should create a teaching outline for a couple of steps of their job. Use the form on page 5.

In your team, take turns being the coach, new surveyor, and observer. Remember to use adult learning principles and the responsibilities of a coach covered earlier in this training.

Always begin with a pre-assessment. Use the On-the-Job Training (OJT) new surveyor pre-assessment form (page 5).

During the practice coaching, the observer should use the OJT observer form (pages 6–8).

After the practice coaching, the coach should complete the OJT new surveyor progress review (page 11).

After the practice coaching, the new surveyor should complete the OJT new surveyor feedback form (page 13).

Directions: Discuss your coaching practice sessions when the trainer brings your class back together.

Job: _____

Task Group	Job Steps and Sub-Steps	Coaching Considerations

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OJT New Surveyor Pre-Assessment

Subject of OJT: _____

Name of new surveyor: _____

The new surveyor has the following certifications or qualifications related to this topic:

The new surveyor has experience or training in the following related areas:

Specific task, skill, or job	Classroom	OJT	Other

The new surveyor needs the following training before starting this OJT program:

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OJT Observer's Form

Use this form while observing an OJT session. Discuss it later with the coach.

Subject of OJT: _____

Name of Coach: _____

Directions: Check the box if you see the coach exhibiting the behavior listed.

Behavior	<input checked="" type="checkbox"/>
<i>Desire</i>	
Was prepared for the session	<input type="checkbox"/>
Taught tasks according to company standards	<input type="checkbox"/>
Checked for new surveyor understanding	<input type="checkbox"/>
Briefly note what you observed:	<input type="checkbox"/>
<i>Responsiveness</i>	
Patiently answered the new surveyor's questions	<input type="checkbox"/>
Seemed to want this new surveyor to succeed	<input type="checkbox"/>
Asked questions to direct the learning process	<input type="checkbox"/>
Briefly note what you observed:	<input type="checkbox"/>
<i>Enthusiasm</i>	
Was positive about the job	<input type="checkbox"/>
Avoided negative comments	<input type="checkbox"/>

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Behavior	<input checked="" type="checkbox"/>
Briefly note what you observed:	<input type="checkbox"/>
<i>Humor</i>	
Kept his or her sense of humor	<input type="checkbox"/>
Shared stories about his or her experiences	<input type="checkbox"/>
Briefly note what you observed:	<input type="checkbox"/>
<i>Sincerity/Honesty</i>	
Admitted that he or she didn't know something	<input type="checkbox"/>
Seemed to care about the new surveyor	<input type="checkbox"/>
Briefly note what you observed:	<input type="checkbox"/>
<i>Flexibility</i>	
Matched the training to the ability of the new surveyor	<input type="checkbox"/>
Changed the teaching session to match constraints	<input type="checkbox"/>
Briefly note what you observed:	<input type="checkbox"/>
<i>Tolerance</i>	
Was open to the opinions of the new surveyor	<input type="checkbox"/>
Seemed comfortable with the new surveyor	<input type="checkbox"/>

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Behavior	<input checked="" type="checkbox"/>
Briefly note what you observed:	<input type="checkbox"/>
Commitment	
Has improved since my last observation	<input type="checkbox"/>
Briefly note what you observed:	<input type="checkbox"/>

Write one thing you think the coach should work on for future coaching sessions:

Write one thing you think the coach did well while coaching this new surveyor:

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Coaching Support

This workshop was designed to help you assess and improve your coaching skills. Completion of the workshop is just the beginning. You will need to practice your coaching skills.

As you continue to learn, you will have support.

When you would like to talk with someone about coaching, contact:

When you would like to read more about coaching, find resources here:

Preparation for On-the-Job Coaching Session

Coaching success is a result of being prepared. Use the following checklist for each OJT session.

Item	<input checked="" type="checkbox"/>
New surveyor scheduled for training	<input type="checkbox"/>
Teaching materials developed and available	<input type="checkbox"/>
Job tools and equipment available and on-site	<input type="checkbox"/>
Training materials reviewed and job skills practiced	<input type="checkbox"/>
Required forms and documents on hand	<input type="checkbox"/>

Training Aids

On the job, it is useful to have easily accessible sources for information. Training aids can help new surveyors remember key points after they finish training.

The training aid above will remind you of key things to do before each coaching session. Think about other information from this workshop that will help you be a successful coach and then create training aids for yourself to use and share with other coaches.

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Your Next Steps

Being a successful coach takes commitment. List what you will do to improve your coaching skills below:

Coaching Readiness Self-Assessment

This form will help you determine your strengths and the things you can work on to improve your success as a coach.

Directions: On the scales below, circle the number that reflects how difficult you think each task will be for you. Circle 1 for “very challenging” and 6 for “very easy.”

Item	1	2	3	4	5	6
Prepare for each coaching session.	1	2	3	4	5	6
Teach tasks according to company standards.	1	2	3	4	5	6
Check for new surveyor understanding.	1	2	3	4	5	6
Answer many questions from a new surveyor.	1	2	3	4	5	6
Be interested in the success of a new surveyor.	1	2	3	4	5	6
Ask the new surveyor questions to direct the learning process.	1	2	3	4	5	6
Show a new surveyor what I like about the job.	1	2	3	4	5	6
Be excited about coaching.	1	2	3	4	5	6
Avoid making negative comments.	1	2	3	4	5	6
Laugh when training doesn't go according to plan.	1	2	3	4	5	6
Share stories about things I've learned the hard way.	1	2	3	4	5	6
Admit to a new surveyor when I don't know an answer.	1	2	3	4	5	6

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Item	1	2	3	4	5	6
Address a new surveyor's concerns about the job.	1	2	3	4	5	6
Adapt lessons to the abilities of a new surveyor.	1	2	3	4	5	6
Change coaching sessions to meet new constraints.	1	2	3	4	5	6
Listen to new surveyor's opinions about doing the job.	1	2	3	4	5	6
Be open to negative comments.	1	2	3	4	5	6
Work with a new surveyor who is not like me.	1	2	3	4	5	6
Participate in training to improve my coaching skills.	1	2	3	4	5	6
Use my supervisor's reviews to improve my coaching skills.	1	2	3	4	5	6
Take my position as a coach seriously.	1	2	3	4	5	6

Evaluation Forms

These forms were given earlier in this workbook. The additional copies are provided so they can be used in class or to make more copies.

- Coaching Readiness Self-Assessment

The purpose of this form is to help the OJT coach assess his or her teaching strengths and weaknesses. It can guide the coach in seeking training or resources for improvement.

- Coaching Training Outline

This chart is designed to help organize a training outline and prepare training sessions before they begin.

- Coaching Checklist

This checklist summarizes the coaching steps. It is to be used as a job aid (1) before training, (2) while coaching, and (3) for self-evaluation after coaching.

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- OJT New Surveyor Pre-Assessment

Use this form to determine the new surveyor's knowledge and skill level before training begins and use it as a guide to help tailor training to the specific new surveyor.

- OJT Observer

This form provides feedback to the trainer on an OJT session. The observer could be a supervisor or another OJT coach.

- OJT Progress Review

This form provides feedback to the new surveyor. It can be completed by a supervisor or the OJT coach. It can also be used as a sign-off form to document completion of training.

- OJT New Surveyor Feedback

This form is be completed by the new surveyor to provide feedback to the OJT coach and the program champion. The information can be used by the coach for self-improvement and by the program champion to assess whether or not changes are needed in the program or its implementation.

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Coaching Checklist

Directions: Use this form as a guide when preparing to coach, while coaching, and for self-evaluation. Observers can also use the form when evaluating a coach.

Coach's Name: _____

Observer's Name: _____

Job Skill Taught: _____

Evaluation Date: _____

Step 1—Focus: Establish rapport, communicate your expectations, and find out what the new surveyor can do.

Things to Do	Guidelines	Comments
Greet the new surveyor.	Shake hands, maintain eye contact, and put the new surveyor at ease.	
Determine what the new surveyor knows.	Ask questions to establish level of knowledge or experience.	
Encourage questions.	Let the new surveyor know it is OK to repeat steps. Explain that training is paced to new surveyor's prior experience and ability to learn the job.	
Share an overview of the job to be taught.	Provide a copy of the module you and the new surveyor will be using to guide training.	
Discuss training safety considerations.	Ensure that the new surveyor will be able to observe safely during demonstrations. Discuss other safety considerations.	

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Step 2—Explain and Demonstrate: Explain the steps of the job, explain why these steps are important, and demonstrate them.

Things to Do	Guidelines	Comments
Explain the step(s) of the job skill.	Give only the amount of information the new surveyor can learn in one pass. Do not overwhelm them.	
Explain why, when, and how each step is important.	Ensure the job steps make sense to the new surveyor. Ask questions to check understanding.	
Demonstrate how to do the job step(s).	Show the new surveyor a safe observation location. Ask questions to determine knowledge and understanding before moving to next job step.	
Encourage questions.	Emphasize that the new surveyor should ask questions when unclear or uncertain.	

Step 3—Observe: Have the new surveyor explain and demonstrate what the coach presented in Step 2.

Things to Do	Guidelines	Comments
Have the new surveyor verbally walk through the step(s).	The new surveyor explains the job (why, where, when, how, and any safety considerations) before demonstrating any part of it. They know it.	
Select a safe observation location.	Ensure you can safely observe the entire demonstration.	
Have the new surveyor explain each step and then demonstrate it.	The new surveyor explains the action before performing each job step. They know and can do it.	

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Things to Do	Guidelines	Comments
Observe the new surveyor as they demonstrate the job.		

Step 4—Feedback: The coach and new surveyor discuss the performance in Step 3.

Things to Do	Guidelines	Comments
Ask the new surveyor to do a self-assessment.	Ask the new surveyor to communicate perceptions of performance. This encourages new surveyors to discuss the task and helps to resolve issues.	
Give feedback on performance.	Point out strengths and areas that need improvement or practice.	
Assess your coaching progress.	Ask the following questions: <ul style="list-style-type: none">• Did you periodically check to establish the new surveyor's level of understanding?• How was your pace?• Are you giving the new surveyor sufficient time to perform?• Are you asking the right questions?• How is the new surveyor doing overall?• Should you go back and restate or emphasize something?	

Cycle through steps 2, 3, and 4, as needed, to develop the expected performance and to ensure understanding before moving on

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Step 5—Assessment: A higher level of management or a predetermined evaluation team conducts the formal evaluation. Local rules for this evaluation should be followed.

Things to Do	Guidelines	Comments
Establish the new surveyor's readiness for evaluation.	Prepare the new surveyor by checking on his or her level of comfort and readiness. Observe and ask questions. Create a win-win situation.	
Make arrangements for the evaluation.	Schedule the evaluation with the appropriate people. Make sure the evaluator has the evaluation checklist (often made from the training outline).	
Based on the outcome of the evaluation, consider the next steps.	Celebrate. Congratulate and thank the new surveyor for participating in the training activity. Discuss follow-up plans. Retrain, if needed. Plan with the evaluator's input. Communicate the results and retraining plan.	

If the process is not over, then move back to the appropriate level and resume with the proper step. If the training is over, do a self-assessment to determine what you will do differently the next time.