



Trainer Selection and Preparation Guide

ADDIE Instructional Design Toolkit Series



Global Learning and Development

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Introduction

This Trainer Selection and Preparation Guide was developed by the Global Learning and Development as a supplement to the Implementation Toolkit, to assist training leads when a large number of trainers are needed and there is not an obvious group to pull from, such as on a large systems implementation or global instructor led training roll-out.

The goal of this document is to clearly define a strategic approach to the selection and preparation of trainers. It includes criteria to consider when selecting trainers, several options to consider when looking for trainers, the risks and benefits of each option, and a recommended approach assuming resource availability. We will also discuss the features that should be included in a trainer preparation program based upon the type of trainers selected. What is NOT included in this document, are topics such as logistics planning, scheduling, the use of the LMS, or anything regarding the development of the training content.

If you have not already reviewed the Implementation Toolkit, we recommend you start there so that you better understand the context in which trainer selection and preparation occurs. Then you can return to this guide to go deeper into the topic of selection and preparing trainers for instructor led or virtual instructor led training.

NOTE

At Cummins, we call this competency [Training Delivery](#). It is different than [Facilitation](#) or Presentation skills which are part of [Communicating Effectively](#). Check out the CDA Library for more information on resources available to build your proficiency in all three of these competencies.

Definitions

Below are some of the terms and definitions that we will use throughout this guide.

Figure 1: Key Terms and Definitions

Term	Definition
Competencies	A set of clearly defined measurable or observable, skills, behaviors and abilities required to successfully perform critical work functions or tasks.
Competency Development Activity (CDA) Library	A library of development activities, created by Subject Matter Experts, for all Functional and Enterprise competencies and intended to provide examples that will help employees improve proficiency.
Train-the-Trainer	a framework for training potential instructors or subject matter experts to enable them to train other people in their organizations.
Teach Back	A way of checking for trainer preparation and understanding of content by practicing training delivery in a safe environment made up of other trainers and SMEs.
SME (Subject Matter Expert)	At Cummins, we say that employees with supervisor-validated proficiency levels of Advanced or Expert in a competency in the Talent Management System (TMS) is a subject matter experts or “SME”.
Training	A structured and organized set of content (a course) that has specific, defined, and measurable outcomes (required changes in a person’s actions and/or behavior – knowledge or skill) and a check to confirm the transfer of the knowledge or skill.
Training Delivery (HR Competency)	Instructs learners in a manner that engages and adjusts to individual and group needs resulting in knowledge, skills and abilities that can be applied on the job.
Facilitation (HR Competency)	Guides group discussions or training by creating an active environment where questions are posed, perspectives are shared, and debates occur with the goal of gaining understanding, analyzing issues, resolving conflict, exploring solutions, or making decisions.
Instructor led training (ILT)	Taught in a classroom setting by an instructor. Scheduled with a location, date, time and time zone. Class offerings and completion are tracked in the Cummins Learning Center
Virtual Instructor Led training (VILT)	Taught virtually by an instructor via Web-Ex, Skype, Saba Meeting, webcam technology environment. Scheduled in CLC with date, time, and time zone. Class offerings and completion are tracked in the Cummins Learning Center

Selecting Trainers

Interviewees in a 2013 DBU six-sigma project repeatedly shared that trainers should have both in depth knowledge of the system and understand how the business will use it in real life. The ideal trainer would have knowledge of current business operations, processes and terminology, and therefore be able to answer most of the participants questions during class. That's why the ideal situation is to select local trainers who are credible, respected, and well-established members of the learner audience. They will already have a rapport with the learners and should be able to help them accept and apply the change more quickly.

The interviewees also stated that the trainers should have patience, empathy and strong communication skills and be able to make training fun while building end users' confidence in their ability to perform their developing skills, whether that's building leadership skills or using a new system.

Below (Figure 2) is a list of competencies that the best trainers demonstrated. While not all trainers will be advanced in every competency, this list can provide an objective set of criteria to consider when evaluating potential trainers.

Figure 2: Competencies to consider when selecting a trainer

Skill	Why is it important?
Communicates Effectively - Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.	The content must be presented so that it is easily understood by the learners. Trainers need to use active listening skills to make sure they understand learner's questions and concerns and to gather live feedback during the session to know when to slow down, speed up or pivot to keep the audience engaged.
Training Delivery - Instructs learners in a manner that engages and adjusts to individual and group needs resulting in knowledge, skills and abilities that can be applied on the job.	In addition to being proficient with the actual delivery of the training content, good trainers are also: <ul style="list-style-type: none">• Service oriented and look for ways to help others.• Able to stick to an agenda and complete tasks on schedule.• Patient and able to stay calm and empathize with others.• Flexible and able to adapt in a rapidly changing environment. These characteristics create a calm, positive environment for learning.
Manages Conflict - Handling conflict situations effectively, with a minimum of noise.	This helps when members of the audience are resisting the change, or when handling difficult learners.
Business Acumen – Applying knowledge of business and the marketplace to advance the organization's goals.	Demonstrates knowledge of current business processes which enables the trainers to link training content to current processes (compare and contrast) and to answer questions about what is NOT changing.

Situational Adaptability – Adapting approach and demeanor in real time to match the shifting demands of different situations.	Trainers are change agents and must demonstrate a willingness to support the business case for the change, so that they can encourage learners to embrace the change as well.
Other competencies related to the content or unique needs of the project.	These can vary greatly based upon the training content but ideally the trainer would be an SME (Advanced, Expert) in the related competency.

A [Training Delivery Skills Assessment](#) has been created to assist with the review of the skills of employees they are being considered as trainers. These skills are needed, regardless of where the trainer comes from (current employee within the business going live, employee from another location, project team member, external contractor, or a hybrid approach combining one of the previously mentioned approaches). The assessment can also be used during (more on that later in this guide) or whenever a trainer wants to request feedback on their performance.

Figure 3: Training Delivery Skills Assessment

Training Delivery Skills					
Rate the trainer's proficiency in the following skills in a spirit of continuous improvement.					
	Exceptional (5)	Exceeds Requirements (4)	Meets Requirements (3)	Marginal (2)	Needs Work (1)
Communicates Effectively					
Active listening — Giving full attention to others without interrupting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speaking — Talking to others to convey information effectively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reflection and Feedback — Assessing performance and stepping in to make improvements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training Delivery					
Instructing — Teaching others to do something, making sure that they comprehend.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service orientation — Actively looking for ways to help others.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time Management — Ability to stick to an agenda and complete tasks on schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patience — Ability to stay calm and empathize with others.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility — Ability to rapidly changing environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Competencies					
Manages Conflict — Bringing people together and reconciling differences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Acumen — Knowledge of Cummins business processes & terminology.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situational Adaptability – Adapting approach and demeanor in real time to match the shifting demands of different situations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Related Competency — Knowledge of new system, process, skills, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTE

At Cummins, we call employees with supervisor-validated proficiency levels of Advanced or Expert in a competency in the Talent Management System (TMS) subject matter experts or “SMEs”. Employees can opt in as SMEs and these are great potential candidates for trainers.

Based upon who is selected and where their strengths and weakness lie, a trainer preparation program will be created to bridge these gaps. The details of the trainer preparation program or Train-the-Trainer (TTT) Program are highlighted later in this document in the section titled: Preparing Trainers.

Trainer Selection Options

For classroom participants to get effective training, it is important that the trainer demonstrates knowledge of the new business processes and systems, along with an understanding how the distributor works in general. Depending on where the trainer comes from (local audience, other location, project team, or externally), their knowledge gaps will differ. Let’s review the various options from which the trainers can be chosen and the benefits and potential opportunities of each option.

Option 1: Local Audience

The ideal trainers are from the location that is the target of the training implementation. They have knowledge of the current business operations, processes, and terminology, and any local variations (language, local regulations, etc.) This should also minimize or eliminate travel expenses. They will need to learn the training content, but a solid training preparation program with opportunities to practice, ask questions of experts, or assist with testing if applicable, should provide them the knowledge they need.

The challenge with this approach is availability. There may not be anyone at the location with availability to assist with the deployment. If the topic is brand new to Cummins, there may not be anyone at the within the company, much less the location, with knowledge of the new topic.

However, the benefits to the business, if they can free up these resources, are great. They will already have resources that can assist with training in the future, such as new hire training, supporting learners with post-training questions, or future content updates. Therefore, wherever possible, managers and potential trainers should consider both short and long-term constraints and goals when considering the allocation of team members to training. Additionally, this work should be included on workplans, individual development plans and considered during competency assessments.

Option 2: Other Locations

The next best option is to select trainers from other locations that have either already gone through the training or are scheduled to go through it soon. While these trainers may not know exactly how things are done at every location (i.e. who performs the various roles or customized internal processes), they have knowledge of current business processes which will give them credibility with the learners.

Also, the group of trainers from various locations can support each other by co-training, backing each other up, and sharing best practices and lessons learned.

Option 3: External Contractors

Another possible source for trainers is to hire contractors or contingent workers (CWKs) externally. This approach allows you to select a trainer with deep content knowledge and experience delivering training. However, they will most likely will not have knowledge of Cummins business operations and processes, so they should be given an opportunity to learn about the changes (how things were done before, what is not changing, etc.) so that then can answer questions outside of the documented training materials. As is the case with any trainers, they can capture questions on a parking lot and send them to a subject matter expert to get the answers and then forward them to the class participants.

Another negative feature of this option is that it's the most expensive because the contract trainers will be charging an hourly rate as well travel costs. Because of the cost of this approach, the contractor trainers usually roll off the project as soon as their training courses are complete and therefore are not available to assist with any post training support or training of new hires in the future.

Note:

It is strongly recommended that there be at least one trainer be identified to train at each location in the future to onboard new team members. They should go through the train-the-trainer, practice delivering the content and sit in on as many training sessions as possible, so that they will be prepared to train in the situations mentioned above after the contractors leave.

Another way to get the most benefits from this approach is to pair up a contract trainer with at least one employee from the location that has been identified to train in the future. They could go through the train-the-trainer together and team teach at least once or twice so that they are prepared to take over after go-live.

Option 4: Project Team

Another option is to consider using a member of the “project team”. We are using “project team” in a general sense here, but basically mean the team that built or purchased the training. On system implementations they usually are extremely busy testing and fixing bugs, etc. at the time when training is needed. Also, if the training audience is large then there may be many more trainers needed than there are team members available to deliver the training.

However, if they have the capacity, they have the knowledge of the processes, training content, etc. which are all pluses. On the flip side, training delivery may not be a strength and because they know so much about the content or change, they can sometimes deviate from the training content and share technical details that cause confusion with learners. They should be encouraged to stick to the training content and if a detailed answer is needed for an individual that would otherwise cause confusion for others, they should have that conversation at a break or after training.

Another risk with this approach is that the project team most likely will not be at the location after training and will not be available to conduct future new hire training. Therefore, even if this approach is needed, a person should be identified to train at this site in the future in case a new employee is hired or if refresher training is needed.

Option 5: Hybrid Approach

Sometimes many trainers are needed at the same time, and a single approach will not work at every location. It is common to use a combination of approaches to gather the total number of trainers needed to deliver all of the training at all locations.

For example, in a phased training roll-out, where training will be rolled out regionally overtime, the first phase (often called the pilot) could leverage project team members and contractors as the primary trainers with support from employees from the site serving as co-trainers. If multiple sessions are needed, the roles could switch with the local employees becoming the primary trainers and the contractors and project team members serving the support role.

In phase 2, the contractors could roll-off the project and the project team members and/or the Phase 1 employee trainers could train the employees from the phase 2 locations in a train-the-trainer event and then either co-facilitate or be available to assist with Office Hours or answer FAQs.

There are endless possibilities, but in the ideal situation, after the initial roll-out each location would have at least one or two employees who are capable of training new team members, answering questions and escalating issues to the correct people.

Figure 4: Summary of Trainer Selection Options

Below is a chart that summarizes the benefits and challenges of the options defined above.

Option	Benefits	Challenges
Local Audience	<ul style="list-style-type: none"> • Have current business knowledge • Builds skills for post go-live training needs (new hires, retraining, upgrades, etc.) • Prepares internal users for post go-live support • Least expensive option 	<ul style="list-style-type: none"> • Resources may not be available • May spread business coverage to thin • May not have training skills
Other Locations	<ul style="list-style-type: none"> • Have Cummins business knowledge • Builds skills for future deployments (get ready early) or help the next distributor (pay it forward) • Less resources needed from 1 distributor, spread out amongst distributors • Prepares internal users for post go-live support 	<ul style="list-style-type: none"> • Resources may not be available • May do some things differently between distributors • Some travel costs • May not have training skills
External Contractors	<ul style="list-style-type: none"> • Have system knowledge • Have training experience 	<ul style="list-style-type: none"> • Do not have current business knowledge • Most expensive options (travel and hourly contractor rate)
Project Team	<ul style="list-style-type: none"> • Have current business knowledge • Have DMS knowledge 	<ul style="list-style-type: none"> • Resources very unlikely to be available • Some travel costs • May not have training skills
Hybrid	<ul style="list-style-type: none"> • Do not need to use the same approach for every trainer role • Combination of the approaches listed above 	<ul style="list-style-type: none"> • May not be available • Combination of the approaches listed above

Preparing Trainers

Regardless of where the trainer came from, they will all need to go through some form of training preparation program, also called a Train-the-Trainer (TTT) program.

Train-the-Trainer Program

The components of the strong Train-the-Trainer Program should include:

1. Introduction to the program
2. Training Delivery Skills - How to be a Good Trainer
3. Training Content -This will take longer to teach trainers than to deliver to end users. Budget 150% time to allow for trainers' questions on how you are delivering the training as well understanding what is covered.
4. Business Shadow Time
5. User Acceptance Testing (UAT) Participation for system implementations
6. Individual Practice Time
7. "Teach backs" – Newly trained trainers take turns practice delivering training modules in front of other trainers and project team members
8. Using Trainer Support Tools (LMS, etc.) – In addition to delivering training, the trainers may have to print rosters or take attendance, or use other tools to administer training
9. Daily and Weekly Trainer Calls – This is simple way to make trainers feel supported and to allow them to learn from each other.

Based upon the background of the trainer, these components may or may not be required. Refer to the chart below for recommendations.

Figure 5: Train-the-Trainer Component Definitions

Component	Definition
Introduction	Overview of the Business Goal(s), Learning Objectives, and Change Management Overviews, Trainer roles and responsibilities, etc.
Training Delivery Skills	Instructs learners in a manner that engages and adjusts to individual and group needs resulting in knowledge, skills and abilities that can be applied on the job. See Training Delivery CDA , aka “Training Presentation” or Training Facilitation skills.
Process & Technology Skills	Experience with the new process and technology. Includes being taught the content they will eventually turn around and train and can include participating in conference room pilots or testing.
Job Shadow	Spend time with the someone that performs the role.
System Testing	Most system implementations include a testing phase. Participation in these events can give trainers additional hands-on practice to build their confidence.
Practice Time	Dedicated time for the trainers to practice delivering the training in realistic environment, using all of the tools they will use in the actual training events (projectors, screen sharing, Zoom features, etc.)
Teach Backs	Time for each trainer to practice training in front of their peers and other SMEs and receive feedback. Should be scheduled to give time for the trainer to adjust before their first sessions. Often conducted at the end of the train-the-trainer event. See Training Delivery Skills Assessment .
Using Trainer Tools	This should cover topics like how to view or print rosters, track and mark attendance during the session (including in the Cummins Learning Center) and give trainers a chance to practice these tasks and ask questions.
Trainer Calls	Scheduled daily or weekly calls for trainers to share their experiences and best practices and ask questions of other trainers delivering similar content.

Below is a summary of a typical train-the-trainer program that shows the content (in the left column), the types of trainers that could be selected (across the top row) and the preparation activities in which they should participate, to be best prepared to train (marked with an X). Not everyone will have the same needs.

Figure 6: Recommended Train-the-Trainer Components by Trainer Type

	Site SMEs	SMEs from previous sites	External Contractor	Project Team
Introduction	X	X	X	X
Training Delivery Skills	X	X		X
Process & Technology Skills	X	X	X	X
Job Shadow			X	
System Testing	X	X		X
Practice Time	X	X	X	X
Teach Backs	X	X		X
Using Trainer Tools	X	X	X	X
Trainer Calls	X	X	X	X

Practice, Practice, Practice!

It is not possible to overestimate the importance of trainers scheduling dedicated time to practice. Not just to become more comfortable with the content, although that is very important as well, but to also get comfortable with the tools that will be used during the session:

- Projectors, multiple monitors, screen share, Notes, view, etc.)
- System demonstrations – What data will you use? Where do you want to go and where do you want to avoid?
- And of course, practice what you are going to say on each slide, or during the demonstrations so that you do not ramble and stay focused.

One last important point should be highlighted here. Regardless of what mix of trainers is used, don't forget to consider your approach to training new hires AFTER the project implementation. Therefore, it is recommended that at least one person should be identified as the post-go-live trainer for each course and should go through the train-the-trainer program and teach at least one of the sessions during the training deployment so that they are set-up for success for delivering training after go-live.

Conclusion

The Global Learning and Development team build the Trainer Selection and Preparation Guide to assist training leads to identify potential sources for trainers, provide criteria for consideration when selecting trainers and lastly to provide a framework for a trainer preparation program also known as a Train-the-Trainer (TTT) program. We hope you found this guide useful. If you have any feedback or recommendations, we welcome them at gld@cummins.com.