TITLE: Creating & Using Training Tools

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Understand the Who-What-Why Behind the Training
Before you create your training tools it would be a good idea to understand why you are conducting the training. Not all training is created equal and the different reasons why you are training may affect how you want to deliver the content. Important considerations are:

Whom you are training – new hire, seasoned, performance improvement, or management development. One person, a specific group (receptionists, techs), or everyone. Who will conduct the training?

What resources will you need – budget for time (the trainer and the trainee), materials and resources

Why are you training:
- Career development of key team members
- Succession planning for key positions in the practice
- Keep the competitive edge of the business
- Understand a specific topic or the use of a specific technology
- Comply with rules, regulations, laws, or standard operating procedures
- Improve profit and productivity
- Improve performance of an individual

If you are training for the use of new technology in your practice (computer system or surgical monitor) you will approach the training a little differently than if you were conducting training on protocol changes for the care of a diabetic animal. The most important factor about any training you do is that the training is aligned with the strategic plan of the practice.

Take a moment and think about the strategic plan of the practice. Do you know what the strategic plan is for this year? What about for the next 2 years? Often, the "plan" is not communicated to everyone on the team. Managers may very well be in the dark about the vision and goals for the next year – which severely hampers training efforts to keep the competitive edge, improve performance, and improve profitability because they have no clue that there is a specific target. There can be so many "irons in the fire" that causes a lack of focus on the training needs of the business – take some time to study the business and note areas where training is needed to improve performance of the team, the level of medical care to the patients and delivery of client service.

The goal for your training is to ensure consistent patient care and client service by every team member, every time.

Creating the Training Tools
All of us, at one point in our training or another, sat in a lecture hall, participated in a role-playing session, took an assessment exam after a presentation, or performed a task while under the watchful eye of a supervisor. Which of these training methods did you like the best? Were there some that just did not seem to be effective for learning the topic? As you create and use your training tools, remember that not everyone learns the same way. Also keep in mind that not everyone makes a good teacher!

Who Will be the Trainer?
One of the training "tools" you need to consider is who will deliver the training? There are a few options – a third party provider or an in-house subject matter expert. While an outside third party can provide excellent

training that is educational, engaging, flexible, and up-to-date on medical advances, it can lack the connection to your unique strategic plan for business growth. An in-house trainer, while an expert on the way things are done in your practice and readily available as the need arises, may lack the skills to be a teacher or coach and lack the resources to present the material.

To develop your in-house trainer, start with your performance evaluations. Change your evaluations to include a rating to identify those who “could train someone else” on a particular task. For example:

1=Poor performance, needs a great deal of improvement
2=Inconsistently meets requirements
3= Meets Requirements
4=Could teach and mentor team members in this area

SKILLS		
Required competencies		
Surgery		Assist, maintain anesthetic machine, instrument care
Lab		In-house lab equip and outside lab paperwork and packaging
X-Ray		Diagnostic-quality radiographs produced, proper position
Pharmacy		Dispense prescriptions properly, proper documentation, explain to client
Dental		Perform dental procedures
Exam Room		Documentation, client education,
Kennel		Cleaning, animal safety, proper care, proper documentation
Treatment		Efficient, organized, thorough
Client Education		Answer questions, make them feel comfortable, gain compliance
Phone		Effective phone manner, smile, clear, handle multiple lines, prompt
Computer appts / invoicing / search		Capable of navigating the computer system? EOD, Adept? Accurate?
Files		Organize files, file accurately
Medical documentation		AAHA, AVMA and even our own policies!!
Developing solutions with clients & staff		How well do you work with others
Time management for responsibilities		Motivated, organized, keep busy, recognize without having to be told
Team involvement, leadership skills.		
Interaction with animals		Fractious animals too
Personal habits - uniform, appearance		Clean, wrinkled, stained, personal hygiene, appropriately sized
Interest in hospital growth & reputation		Involved with developing or promoting new services
Motivation		Able to find productive work, solve crisis, keep busy, assist clients,
Punctuality / Tardiness		Are you in position and ready to work?
Communication skills		Smile, proper English, speak clearly, speak confidently

Include the management team and the individual in the review process and identify those you want to develop as subject matter experts. But do not stop there – develop them! Put some time and resources into developing their skill level as a trainer and coach (it does not come naturally to everyone) and you want this person to be prepared to be a trainer.

Develop skills in your subject matter expert so they can be an effective trainer to your team. Skills such as:

- honing their level of expertise,
- enhancing their presentation/communication skills,
- understanding how to be aware of the trainee's grasp of the material,
- creating SMART objectives for the trainee,
- evaluating job performance after the training session,
- organizing the presentation of the subject matter,
- utilizing various learning styles to work with specific trainees, and
- working with various training methods depending on the subject they are teaching or facilitating.

As you can see, you do not want to label someone a SME (Subject Matter Expert) and then tell him or her to go train the new hire in the lab area. You want to identify the SME and develop their training skills so they are prepared to take on the next new hire. Your SME can be a lifeline for advances in the use of technology and other changes in operations. Send your SME to intense training by a vendor on a new medication, equipment, or service – when they return, they are now prepared to train other key team members and act as the go-to person anytime a question arises after training.

How Will You Train the Team?

The next step is to consider the trainee and how people learn. Incorporating various learning methods into your training tools will help to engage the diverse group of learners on your team. Visual learners want pictures, graphs, and charts. Auditory learners respond to sound and rhymes. Verbal prefer speeches and writing. Kinesthetic learners want to use their hands. Solitary learners prefer self-study, while social learners like to learn in groups. Logical or mathematical learners like to use logic and reasoning models. Can you verbally present topic, use pictures, provide a handout to be filled in as you go along, pass around an object, or do role-playing? It is possible; you just need to mix it up a little as you deliver the content.

Now for the method of delivering the training (Silver & Zielinski):

- Classroom – Instructor led PowerPoint, Video, Storytelling
- Interactive – Group discussions, Brainstorming sessions, Demonstrations, Case studies, Role-play
- Hands-On – Coaching by a subject matter expert, Drills, Apprenticeships
- Computer-based – Virtual training, Self-paced formats
- E-Learning – Tutorials, Webinars, Scenarios and Gaming
- Social Media – Microblogging (called "sparking"), Community knowledge-sharing groups

Each technique comes with its own advantages and disadvantages (Training Today):

- Classroom – Efficient for large groups but not very interactive
- Interactive – Engages those being trained but requires more time and can lose control of the structure
- Hands-On Training – Great for new equipment, not good for large groups
- Computer-based – Easy to use, flexible and customizable. Can be boring and lack interaction with instructor.
- E-learning – Reduces travel and trainer expenses, easy to update, but risks being generic and not specific enough to your practice
- Social Media – Employee driven informal learning but requires knowledge of technology and appropriate, ethical communications.

Consider blending a few of the techniques when you create your training tools to achieve the most return on any training investment. Continue to be on the lookout for new techniques and update your material to keep employees engaged in learning, and to keep your competitive advantage.

New Paths for Training

Upside-Down Training is a recent development in training. Upside-down training is a way of presenting material in the reverse of what has been done in the past (Rosenheck). The training starts, not with learning content, but with being faced with a job task or case study. Content is learned as the trainee proceeds through the task or case.

This method of starting with a case, scenario, or task motivates the trainee to learn as they work through the task or scenario. Teachable moments, decision-making moments, and discussions regarding what to do next make this an interactive learning technique involving real-life issues the person will face on the job. Instead of telling someone that the content they are trying to memorize will come in handy down the road, they get the actual feel of what they will be facing and what knowledge and skills will help them be successful on the job.

For example, instead of lecturing about vaccination protocol, present specific cases to your team. Fluffy is a senior pet, Bella is a new puppy; Jake missed his booster vaccines for the past two years. As your team works through each case, they are able to discuss protocols and how they will communicate medical needs with the client, when to set up appointments, and what fees will be involved. This will also give your team members a chance to discuss new developments they have heard about, and troubleshoot how to talk to clients to overcome objections to recommended treatments.

Is there a new medical protocol you are instituting? Present a few case scenarios and have your teamwork up the case using the new protocol. This way, instead of lecturing to the group and expecting them to put the new protocol into play, let them get a feel for the new steps and have an opportunity to pose questions and build their knowledge by actually implementing the new protocol via the upside-down training format.

Using case studies to teach team members allows for problem solving, the use of tool (analytic, quantitative, and qualitative), and decision making and coping with ambiguities (bu.edu). This method helps the team learn by applying what they have learned to real life situations they will face in your practice. When you set up your case study/scenario, consider the following items as you build the scenario:

- What is the issue
- What is the goal
- What key facts should be considered
- What alternatives are available
- What would you recommend and why

Back to the example on vaccines – Jake is a 6 year-old beagle (house pet and hunting dog) who has missed his booster vaccines for three years because the client said they simply forgot to make appointments. The issue – what does Jake need, do any of the vaccines need boostered in a month, what other medical issues should be addressed (since you haven't seen Jake for over 3 years), etc. Now add a few twists…Jake has not received his vaccines because he has been undergoing treatment for a medical condition (pick something specific). How does this change the issues, key facts and recommendations?

Do not forget to present a well-rounded training scenario by "talking" to all the learners in your group – include reading material, handouts, open discussions, closing summary with actionable items for successful handling of their patient and client experiences.

Using case study training can also be beneficial in training your team on conflict resolution, OSHA safety techniques, diversity training, and harassment training. Present the team with case scenarios involving the OSHA Hazard Identification Ratings System – what will you do, how you protect yourself, what precautions should you take, etc. Perhaps a scenario regarding a zoonotic hazard can get the team talking about procedures, protocols, and safety. Conflict or drama scenarios can provide a safe way to discuss difficult personalities and how to best handle the situation when the scenario is presented as a case study, thus enabling the group to recognize different personal viewpoints, different solutions, and different communication skills. Instead of lecturing the team into boredom, involve them in active discussions.

Microblogging (using a tool called Spark, Yammer, or Chatter) has enabled companies to actively engage their team members in a cost-effective format of knowledge sharing using a social platform (Zielinski). Team members write blogs, post short videos, pose questions, start conversations about a concern, share information, and update information on an internal company platform.

Microblogging within an organization allows the team to tap into their collective intelligence and help others learn by viewing recommendations, insights, and solutions to questions posed by themselves or other team members (Zielinski). In this case, your business sets up an internal, private, microblog platform – think of this as twitter for only your company (Spahr and Brkan). Team members can post questions and immediately receive responses from others who faced similar situations or are knowledgeable about the subject. Instead of waiting for a team meeting or ignoring the issue, your team can readily respond to each other on their cell phones or desktops.

The use of these social media platforms enables your practice to harness the knowledge of your own subject matter experts, those people who do it right, do it your way, do it consistently for the best results in patient care and client satisfaction. Perhaps your subject matter experts can get together and create a blog series on a topic, containing written material and videos, and then be available to address any microblogs from fellow team members needing clarification or assistance in dealing with the topic.

For example, consider the uncertainty a new hire feels when they are officially "on their own" in exam rooms. Instead of having them simply "wing it" or lose valuable time looking for someone to answer their question, they can microblog their question. Any employee sees this message and can quickly respond with the answer and guide the new hire through the situation. As another example: perhaps a doctor reads an article about a new treatment protocol and wants to open it for discussion – microblogging can allow your team to read the article, ask for more information, present ideas, etc. By the time an official meeting date rolls around, your team has had the chance to gather information and formulate important points – now the meeting has focus and time can be spent on priority issues. Once the new protocol goes into effect, send it out over your microblog network to inform everyone, give him or her a quick reference to always have on hand, and let him or her post questions as situations arise.

One thing to note – many practices have banned the use of cell phones while "on the floor" and the use of microblogging means that policy would need to be changed. Is your team culture ready and willing to carry their cell phones but refrain from excessive personal use? Obviously, there are some issues to iron out – concerns about hackers, the potential for negative comments from employees, legal issues about confidentiality of client information, objectionable or offensive comments and loss of productive time from personal use.

However, consider this report from the Society for Human Resource Management (Daniel) – companies incorporating various social media tools into their communication strategies post higher returns, more effective marketing, better access to knowledge, improved employee engagement and better client satisfaction. Using Web 2.0 does have its benefits. Some companies use Facebook to communicate information to their employees, allowing for open dialogue, questions, and concerns. Others have found that using microsharing programs allow for immediate communication that enhances the quality and efficiency of everyday workflow. Here is one training topic for your practice – train your team on how to use your specific social media platforms to reach clients and fellow team members.

Create and Use

Training must be methodical, planned with clear objectives. Be certain to follow the follow steps as you put together your training program (Gendelman):

1. Strategic Needs: Take the time to carefully determine what your team needs in order to perform the processes necessary for implementing a successful strategic plan, and which KPIs you are going to use to monitor the success of plan. Remember, training is linked to the strategic plan for business growth, patient care and client service…does your team have what it needs to deliver on all three of these?
2. Current Assets: Evaluate the assets that you currently use to support team member's performance on the job – such as procedure manuals, SOPs, and the myriad of other materials and resources that your practice has developed or has received from third-parties. Have these been updated and able to be used for training purposes?
3. New Assets: Begin thinking about the tools that you need to support each process identified in Step 1. Analyze this 'need' with the assets you identified in Step 2 to gain a clear understanding of any

additional tools or resources you will need to purchase, or any management changes you will need to implement.

4. Costs: Consider the cost of development and implementation, and labor costs. Tools, resources, human resource management changes, training hours, etc. all come with a price. You do not want to be wasting time, resources or profits – either from unnecessary activities, or from neglected necessities.
5. ROI: Set aside time to note the return you have realized on your investment. Has there been a change in those KPIs you identified in Step 1?

The following is an example of an alignment chart for KPIs and Training. Using a tool such as this chart can help the management team organize the training and correlate the training with the strategic plan of the business.

KPIs	Personnel	Processes	Resources	Training	Expense	Return on Investment
KPIs From: Practice Management System, Accounting Software, HR numbers, Operations numbers, Survey results	Trainer Trainees	(Specific for the training topic)	Equipment, Documents, Job Aids, SOPs, Handouts, Forms, Handbooks	Classroom Interactive Hands-on Computer-based E-Learning Social Media Platforms	Wages for trainer & trainee Cost of materials to print or use Fees for online registration or social media platforms	

Organize your training to save time and money. Organize training to provide a benefit to the business and to the team members receiving the training. Mapping out a clear plan ensures training success. You can create your own training tools and use them to advance your team – all it takes is a little bit of organization.

Design your training tools to work with your practice's strategic plan, team members, and resources. Do not be afraid of technology, but instead, use it to your advantage. Call upon your team – your subject matter experts – to create case studies or oversee your internal microblog. Learning should be interactive and fun, as well as informative. Your culture should be one of information sharing and team development, as well as profitable for the business. In the end, the real winner is the patient who receives high quality, consistent medical care.

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