Training Implementation: Variations Affecting Delivery

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The problem and the solution. Criticisms of structured training include its perceived lack of flexibility and creativity. Although disciplined adherence to a linear process may not appear to be problematic in the analysis, design, development, and evaluation phases of instructional design processes, it would be lethal in the implementation phase. Flexibility and creativity are essential when facing learners in real time. Because not every contingency can be identified ahead of time and learners can be fickle, during the implementation phase trainers must clearly understand what is to be achieved and have an adequate repertoire of methods and techniques with which to achieve it. This article surveys developments in the implementation of training focusing on the interaction between instructor and learner. This focus helps reframe the view of implementing training to include the need for increased flexibility and effectiveness through formal and informal learning within organizations.

Keywords: *instruction; learning; training delivery; facilitation*

There is a visceral "moment of truth" when engaging an audience—regardless of whether it is an actor on stage or an instructor in front of a group of learners. All the efforts and best intentions of instructional analysts, designers, and developers surrender to the dynamics of the trainer and the learner during the implementation phase. Learners engage in multiple ways with an instructor, the content of the learning, and other learners through an interactive process commonly called *a learning transaction* (Galbraith, 1991). The learning transaction mediates the achievement of the objectives through the art and science of instructional methods, techniques, and devices (Conti & Kolody, 2004). And although the goal of the transaction is to achieve the objectives of the learning design, it is through a relatively unpredictable process of question and answer and give and take that leads learners to the objectives that were established at an earlier time.

The interactions among the people and the content in the context of a learning transaction can be extremely complex and variable. Multiple factors influence

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the implementation phase in ways that are difficult, if not impossible, to predict fully ahead of time in the design and development phases. The effectiveness of the learning process, created in the design phase, depends largely on the outcome of the interaction with learners—the learning transaction. Effectively managing this transaction is the goal of the implementation phase of the analysis, design, develop, implement, evaluate (ADDIE) process.

One of the major criticisms of the systematic training process stems from the perception that it is a regimented problem-solving process. From a rational, engineered approach, the implementation phase can become an overdetermined prescription on how to deliver the learning content—with the anticipation that learners will learn and prove it in the following evaluation phase.

This article addresses the implementation phase of the ADDIE process with a look at methods of instructional delivery spread along a continuum extending from instructor-led to learner-led strategies. First, this article addresses factors that enable and constrain instructor-led strategies, including the midpoint in this continuum in which the instructor's role concentrates on facilitating learning. In addition, addressed is an important factor of instruction—the role of influence in the learning transaction. Next, this article addresses the opposite end of the continuum. The section of learner-led methods of delivery takes a look at the learning transaction in self-directed learning, followed by a brief argument for embedding a complementary mix of all these methods in the organization. The final section discusses implications for human resource development (HRD)–related to reframing the implementation phase in the ADDIE process and of perceiving a broader view of implementation methods in meeting the current and future learning needs of individuals and organizations.

Before moving on, it is important to clarify a couple of terms used in this discussion. For example, in the literature, the terms *instructor* and *facilitator* are sometimes used interchangeably. Generally speaking, *instruction* is "to give special knowledge or information to" (Gove, 1993, p. 812) and *facilitation* is "to make easier or less difficult" (Gove, 1993, p. 1172). In most cases, both actions occur to varying degrees within the same learning experience. *Instruction* implies more directive action, and *facilitation* implies more supportive action related to the learning transaction. In addition, the differences between instruction and facilitation reflect differences in the philosophy and expectations of the instructors during the learning transaction. Instruction is more directive with control designed to be in the hands of the instructor and experts. In contrast, facilitation is more supportive sharing the control of the learning with the learner. In the discussion that follows, instruction will indicate more instructor-led learning and facilitation will indicate instructional support for learner-led learning.

Instructor-Led Methods of Delivery

Despite the continuous clamor about the rapid pace of change, the constant turbulence of technological revolutions, and the paradigm shift to a knowledge

economy, learning—especially formal learning—follows a centuries-old process. The 2005 Industry Report by *Training Magazine* found that 70% of formal training in industry still took place in a classroom with an instructor (Dolezalek, 2005). Although the trend for this form of delivery is dropping (Goldstein & Ford, 2002), it is still the dominant form of instruction used in adult education and the workplace.

Trainers and educators often rely on a small repertoire of time-worn processes to promote adult learning in the implementation phase. The use of subject matter experts (SMEs) and instructors engaging learners in relatively one-directional learning transactions is still the standard of most instruction. In the best cases, the instructor or trainer delivers information and knowledge by communicating, helping, and motivating learners to learn. Galbraith (1991) described six educational principles for guiding the learning transaction with adults (p. 16). The instructor should:

1. operate with an appropriate philosophical orientation
2. recognize the diversity of adult learners
3. create a psychosocial environment conducive to learning
4. provide opportunities to challenge the teaching and learning interactions
5. foster critical reflection and praxis
6. encourage independence.

Certainly, the conditions, the type of training, and the objectives for learning emphasize some of these principles over others. For example, technical and procedural training on the job may be most effective and efficient with a straightforward transfer of information from the expert to the novice, followed by guided practice to build mastery of the procedure (Brethower & Smalley, 1998; Sisson, 2001). For centuries, this was the predominate form of instruction and continues to be the basis for the delivery of training in the workplace.

Often considered the beginning of the field of HRD, the Training Within Industry (TWI) program codified a strict process of training development and delivery. Formed during World War II to help industry quickly and efficiently train a novice workforce, this program quickly recognized the importance of implementation in the training process. No matter how creative and theoretically sound the design and development of the instruction—unless it could be delivered effectively and efficiently it was useless (Dooley, 1945). The fundamentals of implementation in the TWI approach stressed the importance of a training method that promotes "believability, acceptability, and usability" of the program content (p. 177). Another mandate of the program was the ensurance that the training would be successful in the hands of "average trainers" (p. 180) not just superb trainers. "Try-outs" (a form of pilot testing or practice delivery) were an essential part of the TWI development process recognizing the benefits of early feedback from the audience. Practice was essential to the delivery phase. Similar to the idea of formative evaluation, formative

implementation was a source of continuous improvement of the training implementation process.

TWI based much of its success on the prior work of Charles R. Allen, who developed a four-step instructional method during World War I. Allen stressed the difference between teaching and telling, and between instructing and showing. In Allen's words, there was a distinct difference between knowing how to do something and knowing "how to put it over" (Dooley, 1945, p. 189). Knowing how to put it over was knowing how to deliver content effectively.

Many of today's instructional methods used by designers, developers, and instructors and/or trainers draw on the didactic notion that the instructor is the expert transferring information and knowledge to the learner. This tradition is not just a hollow cultural artifact carried over from earlier times. There is significant evidence that these methods are effective at fostering learning despite modern criticism (Goldstein & Ford, 2002).

Of all the traditional methods, the lecture or presentation has been under the most attack—possibly because it is the most common method of instruction. The benefits of the lecture and presentation methods are primarily informational and economic. It is an efficient, low-cost way to deliver information to a large audience (Goldstein & Ford, 2002). However, as with any method, it can be misused and poorly executed. The problem is not inherent in the method. The problem may be the misspecification of the method because of the preferences or biases of the designer or in poor execution because of incompetence of the instructor. For information and knowledge that needs to be "in the head" of the learner, a lecture or presentation can be an effective method to transfer information. In their recommendations for the appropriate use of presentations and lectures, Davis and Davis (1998) prescribed 15 rules to increase the effectiveness of presentations and lectures. These rules derive from the three critical foci of cognitive learning theory:

> - Attention: Get [the learners'] attention. Help them focus. Do not overload the [information-processing] system. Slow down for new or difficult material. Do not compete with distractions.
> - Information processing: Realize that interpretation is always taking place. Help people discover patterns. Present information in context. Explain the meaning. Link new information to prior knowledge.
> - Memory: Allow time for short-term memory to function. Get people actively involved in remembering. Provide mnemonic devices. Introduce people to rehearsal, encoding, imagery, method of loci, and semantic association as memory aids (p. 173).

Contrary to popular opinion, research has found the lecture method to be effective for learning informational content in certain situations (Goldstein & Ford, 2002). The disadvantages of lecture as a method stem from its passive

learning mode and the fact that it does not tend to engage multiple senses of the learner (Farrah, 2004). Lecture or presentation is not the best method for learning new motor skills, technical skills, or modifying attitudes. One can minimize these drawbacks through a skillful use of the method and by blending lecture and presentation with other more active methods. The choice depends on the learning objectives, type of content to be learned, needs of the learners, skills of the instructor, and constraints and resources available for learning (e.g., the norms of the organization, the learning environment, and the capabilities and availability of experts).

The capabilities of the instructor, trainer, or expert have a significant influence on the learning transaction (Goldstein & Ford, 2002). Capabilities include the use of instructional methods, fluency with the content, and interpersonal skills. The instructor, trainer, or expert is the medium through which the learning transaction occurs.

Swanson and Falkman (1997) identified 12 categories of problems faced by novice trainers and engaged an expert panel to recommend solutions to these common problems. Interacting with trainees (e.g., handling difficult learners, eliciting participation, adjusting to individual needs, and responding to difficult questions) and handling the dynamics of the instructional environment (e.g., timing, adjusting instruction "on the fly," and achieving effective openings and closings) were the major problems faced by novice trainers. These difficulties concern the dynamics of interacting with learners.

Fostering engagement of learners has long been a critical requirement for effective instruction. Throughout the years, designers have developed numerous techniques to foster engagement with learners. Maintaining learner engagement becomes more difficult as the distance between the instructor and learner increases. However, even in a widely dispersed and asynchronous environment learner engagement is critical. Lemak, Shin, Reed, and Montgomery (2005) studied teacher effectiveness in distance learning compared to face-to-face environments. They found no systematic difference between the two physical environments. Differences depended not on physical distance but on transactional distance—defined as the quality of the dialogue and structure of the course. In that study, *dialogue* was defined as the communication between the student and instructor; *structure* was defined as the flexibility, or lack of, of the program. Lemak et al. cited several other studies all reporting that interactivity of any type increases student motivation, satisfaction, and achievement (p. 151). Lemak et al. concluded that effectiveness is more an outcome of the behavior patterns between the instructor and students (i.e., interactivity) than a result of the environment, distance, or media used.

Anyone with a variety of experiences as a learner knows the importance of the instructor relative to the content. According to the studies described above, the critical role of the instructor does not abate when using nontraditional technologies. Whether the instructor is live in the classroom, virtually live through electronic media, or inherent in the individual learner (as in self-directed

study), the interaction between an instructor and the learner is a critical factor in learning—especially as the trend in training and instruction includes more electronic media, distance education, and asynchronous instruction.

Many other methods of presenting information to learners fall into the category of instruction, defined as the transfer of special knowledge or information. These methods usually vary by types of media, the level of learner participation, and the delegation of responsibility for the content (Laird, Naquin, & Holton, 2003). Even self-study methods, in which the instructor is absent, still depend on the presentation of information and knowledge through some medium. In this case, the learner takes on more responsibility for managing the learning transaction, although the learning is still a transaction between experts (perhaps in absentia) and learners.

The evolution of training has followed the developments in psychology from behaviorism to cognitivism to constructivism perspectives. Methods and techniques of instruction mirror this evolutionary profile. There is a tendency in the popular, and to some extent in the scholarly, literature to favor instructional methods based on their novelty and popularity. Often, instructors think that novelty will increase the level of learner interest that has waned through familiarity and boredom. Perhaps popularity contributes to increased levels of believability and accessibility. However, choosing an instructional method based solely on its attention-getting potential does not make information and knowledge more valuable.

Instructors and designers often dismiss the effectiveness of lectures and presentation in favor of multimedia, cases, simulations, games, projects, or learning contracts. Yet the learning transaction in many cases tends to be a one-directional process of information acquisition by the learner from expert sources. The expertise may be transferred through a computer, algorithm, or book instead of an instructor, and the medium may increase attention and engagement from the learners; however, still the learning process is transactional from expert to novice. The transaction may also require the learner to search and extract information residing in environmental sources. These methods may spice up the delivery; however, in the end, the content must be believable, accessible, and useful.

Facilitating Learning

A midpoint on the continuum of implementation between instructor-led and learner-led is a process of sharing control of the learning transaction with learners. The role of the facilitator becomes somewhat subservient to learners in their quest to develop expertise. Grounded in humanist and constructivist philosophies, a facilitator strives to help learners acquire the information and knowledge desired. The information and knowledge may be prescribed ahead of time in the design; however, the method of acquiring it is more in the hands

of learners. Facilitators guide the learning transaction by providing resources and helping the group overcome obstacles. A major difference between instruction and facilitation is often that with instruction, experts dole out the information to novices with the intent of developing expertise (focus is on the content); with facilitation, learners search, acquire, and develop their expertise as determined by the learners and supported by the facilitator (focus is on the process). Of course, because this is a continuum there are different degrees of learner and expert control of the process—at different times as well.

Andragogy, in contrast to pedagogy, prescribes a facilitative learning environment in which participants share responsibility for their learning with facilitators. This requires a facilitator to be more tolerant of ambiguity, more patient, open, and empathic of the learners, and more accepting of the results—as defined by the learners (Knowles, Holton, & Swanson, 2005). Group process skills rather than subject matter expertise become the primary focus of the facilitator.

Heron (as cited in Raelin, 2000) described six types of facilitator roles. The skill of implementation is to know when to engage one of these six roles at which time. The roles are:

- Prescriptive roles deliberately offer advice and direction.
- Informative roles offer leads or ideas about how to proceed on a given matter (e.g., identify resources).
- Confronting roles directly challenge members of the team on such issues as their current process, evolving relationships within the team, or restricted intellectual frameworks.
- Cathartic roles address emotional undercurrents and seek to release tension (e.g., by prompting anger or expressions of insecurity).
- Catalytic roles provide a structure or framework to encourage the development of an idea or to remove an obstacle (e.g., suggesting that a learner stop, reflect, role-play, or report).
- Supportive roles display care and attention and offer empathy (p. 150).

The goal of facilitation is to enhance the learning process. Rees (1998) described several responsibilities of a facilitator, the first of which is to remain neutral on the content. The remaining responsibilities focus on enhancing group processes and encouraging equal participation from all members of the group (pp. 22-23).

Facilitation skills also apply beyond the scope of the learning transaction. Facilitators enhance group problem solving, decision making, operations, management, and leadership in organizations (Rees, 1998). Another way of looking at this expanded scope of facilitation is by considering the need for

learning in many of these functions. As learning becomes less formal, facilitation becomes more appropriate to the learning process. It is also important to recognize that ill-structured problems and highly abstract knowledge requires interpretation from multiple viewpoints. Facilitation is better suited to managing the group processes that allow for multiple viewpoints to interact. In fact, an expert-driven instructional approach based on a single perspective (the one best answer) is often detrimental to creative problem solving and learning.

Action learning is a facilitated learning experience implemented to resolve real organizational problems while developing the capabilities of participants (Marquardt, 2004; Rothwell, 1999). Marquardt identified additional roles of the facilitator (or learning coach) within action learning to be the roles of teaching, training, administrating, advising, and advocating. It would not be useful to consider implementation in action learning as a delivery process alone. The facilitator may deliver some content; however, more likely, the learners acquire content through various means. The facilitator guides the process by helping participants find successful outcomes.

For adult learners, the requirements of believability, acceptability, and usefulness of the information often determine the effectiveness of the implementation. Each of these requirements depends on the quality of the analysis and the quality of the medium chosen to deliver the content. The most believable, acceptable, and useful content can be undermined by poor delivery. And conversely, the best delivery cannot make up for unbelievable, unacceptable, and useless content. Content and delivery must work together to reinforce and promote each other. It is easy to say that experts are the best judge of what is believable, accessible, and useful; however, unless the learner believes this, the effort will usually fall short of its objectives. The context and the medium through which the learning transaction occurs are an important and critical influence on the believability, accessibility, and usefulness of information and knowledge.

The Role of Influence in the Learning Transaction

Even though learning is understood to be a personal process, it most often takes place as a social activity—especially in the workplace. And as a social activity, learning often succumbs to the influences of social personalities, norms, beliefs, values, and assumptions. The discussion above noted key factors in the effective delivery of instruction to be the believability, accessibility, and usefulness of the information for the receiver in the learning transaction. However, these three criteria are not restricted to the content of the learning; they apply equally to the instructor, facilitator, instructional media, and the context of the learning.

The psychology of influence has documented several conditions that persuade people to adopt or reject ideas and products. Information and knowledge

are certainly made up of ideas, and often the content of a learning design is considered a product to be sold to learners. In the language of the marketplace, the instructor must influence learners to buy the content by influencing its believability, accessibility and, most of all, usefulness. Cialdini (2001) described six factors that affect the outcomes of influence. These are:

- reciprocity: People tend to repay what has been provided to them.
- commitment: People tend to encourage and support that to which they have committed.
- social proof: People tend to see an activity as appropriate when they witness similar others doing it.
- compliance: People tend to comply with someone they know and like.
- authority: People tend to obey those in authority.
- scarcity: People tend to value items more if they are rare or limited.

It is easy to see these factors of influence at work in the learning transaction. Making a commitment to a course, buying a book, following the suggestions of experts and peers, adopting best practices, attending industry-mandated training, and learning what others believe are affected by these factors of influence occurring during the instructional process. Instructional analysts look for these dynamics, instructional designers plan for these outcomes, and instructors rely on these factors for achieving their learning objectives. Implementation is a process intimately bound to social dynamics and influence. The effects of influence are prevalent in the delivery of learning content, even when the influence of authority and compliance becomes less overt, for example, in self-directed and experiential learning transactions.

Learner-Led Methods of Delivery

The ADDIE process is a formal and systematic method to handle learning requirements. The systematic nature of the process places most of the development in the hands of learning professionals; and, when ready, they engage learners. More and more learning professionals recognize that the complex and multidimensional nature of learning means that there is a profound amount of learning that happens outside of this formal process. Recognizing the pervasive nature of learning and the processes by which informal learning occur helps to enrich the planning and execution of formal learning. Systematic training becomes more robust with the inclusion of alternative methods and nontraditional processes. The following discussion takes a brief look at a few learning processes generally considered outside of the formal training process, for example, self-directed, informal, and organizational

learning. The intent with this digression is to broaden the scope of the training process and enhance its flexibility and power to meet the needs for flexible, continuous learning.

Shifting control of the learning transaction to the learner is the objective of humanist and constructivist philosophies of learning. Rather than the transmission of information from instructor to learner, as described in the teaching methods above, humanist and constructivist methods favor facilitating the ability of the learner to control the development of useful knowledge and skills. At its extreme, the learner experiences learning outside of a formal process. Self-directed learning has always been an attribute of adults, primarily in informal situations, and is becoming increasingly important as a factor in workplace learning (Merriam & Caffarella, 1999).

Although not traditionally structured in the linear stages of the ADDIE process, informal learning still includes phases similar to analysis and evaluation (as the learner intentionally processes information), design and development (in the way information is structured in the environment), and implementation (in the way the learner acquires information from the environment). Acquiring information and building knowledge from experience is another form of a learning transaction.

There is a growing appreciation for the amount of informal learning that occurs in the workplace. Marsick and Volpe (1999) described informal learning as learning that is unstructured, experiential, and noninstitutional, and driven by the learner's choices, preferences, and intentions (p. 4). Even under these conditions, learners still engage in a learning transaction by acquiring information and building knowledge, though less predictable.

Choosing which methods, techniques, and devices to use for implementing the learning transaction derives from one's philosophical approach to education and teaching preferences. Conti and Kolody (2004) described four areas that affect the learning transaction: teacher, learner, content, and situation. When looking beyond formal learning situations the relationship between these elements becomes more variable. Considering informal learning situations, the learner may assume the roles of the teacher and the learner, particularly among knowledgeable and sophisticated learners. However, learners may not be skilled in these roles. Self-directed learning addresses this issue of a blended instructor–learner role by preparing the learner to facilitate his or her own learning (Piskurich, 1993). Learner readiness and metacognitive skill development are concepts that address the ability of learners to manage their own learning. One hope is that preparing learners to manage these roles will increase the quality of informal learning in organizations and promote continuous learning.

Organization-Embedded Methods of Delivery

As the need for continuous learning increases, organizations can develop environments more conducive to learning. Many of the attributes of the learning

organization strive to promote continuous learning by its members and attempt to acquire, interpret, and codify this knowledge into the organizational structure (Garvin, 2000).

With increased interest in learning organizations comes increased frustration with realizing such an organization. Garvin (2000) described this frustration as stemming from the difficulties of implementing the actions required to achieve higher levels of learning in the organization. This description echoes the ongoing frustration with implementation at the individual level. How does one ensure the acquisition of information and development of knowledge by the learner or organization? And, how does one ensure the application of this knowledge to the job?

Numerous academics and practitioners have prescribed the design of learning organizations, and there are numerous definitions in the literature (Garvin, 2000, p. 10). Garvin's (2000) recommendations for implementation of learning at the organizational level are remarkably similar to implementation methods and techniques at the individual level, that is, create an environment supportive of learning. He described specific attributes of a learning organization as ability to: (a) recognize and accept differences, (b) provide timely feedback, (c) stimulate new ideas, and (d) tolerate errors (pp. 34-43). Other views take a more mechanistic view of organizations characterizing learning in terms of information-processing systems (DiBella & Nevis, 1998).

Despite the problems of transferring constructs across levels of analysis, many descriptions and prescriptions for learning at the organization level focus on enhancing the ability of individuals in organizations to process and embed information in organizational systems (DiBella & Nevis, 1998; Garvin, 2000; Senge, 1991). Just as learning design can work at the individual, operational, and organizational levels, implementation can work at the individual, operational, and organizational levels. Developing implementation of learning as an element of organizational culture facilitates continuous learning throughout the organization—formally and informally—individually and organizationally. A key characteristic of learning organizations is fostering and embedding implementation of learning practices in the culture of the organization.

Implications for HRD

A broad view of delivering training in organizations recognizes the interdependencies between implementing a specific intervention and the learning culture of the organization as a whole. Implementing a training design without the support of the organization seems destined to failure. This was recognized more than one-half century ago by the TWI program.

Taking a narrow view of the ADDIE process does not serve a broader need for learning (knowledge and expertise) in organizations. Narrowly designed learning events often have relatively little connection to the larger environment within which individuals learn. Learning processes are important parts of the larger organizational system, and taking a systems view encourages organizations

and individuals to integrate informal and organizational learning with formal learning. Systems thinking recognizes the interdependencies of the parts within a larger whole. The conceptual aspects of systematic learning are viable in this larger context. However, too often the traditional application of ADDIE has been confined narrowly to individual instructional events that almost always provide too little practice for learners to achieve the desired levels of expertise.

A concern in organizations may be that the difficulty of building a systems-level learning process interferes with addressing immediate tactical needs for learning at the individual level. Taking a broader view of a systematic learning process should not postpone action in the short term. Parallel development of individual, operational, and organizational learning can co-occur and can benefit from a blended approach. For example, engaging learners and key stakeholders during the other phases of the ADDIE process is a form of implementation in the sense that learning can be fostered during analysis and evaluation. In a sense, the ADDIE process itself becomes a learning process. Stakeholder learning is often underestimated, and yet it is a critical component of learning in organizations. The gathering and analysis of data around a problem is an opportunity to learn by challenging underlying assumptions about performance and the biases for certain solutions over others. The collaborative design and development of learning also affords stakeholders and learners the opportunity to reflect critically on the reasons for undertaking one intervention over another, and to recognize limitations of the process in time to refine, redesign, or redirect efforts in the spirit of continuous improvement.

It is widely believed that having to teach something forces one to learn the material better than simply being a student of the topic. This is because that to be effective the teacher must not only know the content but also know "how to put it over" in Allen's words (Dooley, 1945). Extending the learning transaction beyond the typical classroom or training module extends the implementation of learning beyond the fourth phase of the ADDIE process. Why not facilitate learning with key stakeholders in the analysis, design, development, and evaluation phases? This may happen haphazardly anyway. Why not systematically ensure that this happens by facilitating learning throughout the ADDIE process with all stakeholders—not just targeted trainees? This is one way to refresh the ADDIE process to meet today's needs for continuous learning at multiple levels of the organization.

In conclusion, the action and feedback coming from the implementation phase are valuable data that are often underutilized in the ADDIE process. One way to alter the process is to incorporate multiple iterations and nesting of processes within processes. This would better reflect the complexity of the real-world expertise required of learners back on the job. Following this approach, trainers can construct learning subprocesses within the overall training process and implementing them throughout the different levels and functions of the organization.

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