

*Entelechy's Newsletter for Trainers, Managers, HR Professionals and Others  
Responsible for the Performance of Others*

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MORE FROM SMES

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(Tip: Copy this section and forward it to your training colleagues.)

How do we best find and get cooperation from Subject Matter Experts (SMEs)?

- Get the manager/client/stakeholder to identify these upfront in the initial meeting. The best ones will be identified initially whereas the most available will be identified later.
- Have the manager/client/stakeholder make the initial contact to the SME on your behalf (actually on the project's behalf).
- When you first meet with the SME, outline your expectations/needs regarding the SME's level and length of involvement.
- Be flexible when you can. Negotiate.
- Give the SME choices. "Would Friday or Monday work better for you?" Get them to come up with a timeline that meets their schedule.
- Show how you are doing everything you can to minimize the impact your requests have on the SME.
- Suck up!! Publicly acknowledge the support you're getting from the SME.
- Not getting the level of support from the SME? Talk to the manager/client/stakeholder and enlist their insight. Don't blame the SME. "John, I'm having trouble connecting with Roberta. Perhaps you could give me some ideas..." works better than "Roberta's not cooperating at all..."

- Be friendly.
- Tune to WIIFM (What's In It For Me). You'll often find out that there is little in the way of tangible incentive for the SME to help.
- Be reasonable about your expectations.
- Adapt your communication style to that of the SME. If they are rushed and busy, adopt a concise, brief communication style.
- Ask the SME throughout the project for feedback on how it's going. Are you giving enough direction?
- Thank the SME for their significant contribution. Then send an email to the manager/client/stakeholder (ccing the SME) praising the efforts and contributions of the SME. Then send one to the SME's manager (if it's someone other than the client/manager/stakeholder. This will ensure that you have a SME for your next project.

These tips come from *Practical Design and Development Tips*, one of four eGuides available from Entelechy. *Practical Design and Development Tips* provides not only a comprehensive overview of the industry's most used instructional design process – ADDIE (Analysis, Design, Development, Implementation, Evaluation) – it also contains over 130 shortcuts and tips that help you deviate from that process to reduce training design and development time. Check out <http://unlockit.com/eguides.htm> for more information and to order.

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#### DEVELOPING TRAINING BASED ON CONTENT TYPES - PROCESSES

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This is the fifth of six installments that focus on developing effective training based on content types. The model, developed by Dr. M. David Merrill at the University of Utah, is especially effective for blended learning since it helps distinguish content that may be more effective for self-paced training (i.e., WBT, CBT, MBT) and instructor-led or mentored training.

In this instructional design model, there are five primary content types: Facts, concepts, processes, procedures, and principles. Each of these content types can be taught at two levels: at the Remember level and at the Apply Level (except for Facts which only can be taught at the Remember Level). For example, you can DESCRIBE the process for escalating a call with a belligerent customer (Remember Level) or you can DEMONSTRATE your knowledge of the call escalation process using a role-play scenario (Apply Level).

We'll focus on processes in this installment.

## Definition of Processes

Processes are descriptions of how things work. There are two basic types of processes: business (describing work flows in organizations) and technical (describing how things work in equipment or nature).

Learning about processes results in knowing how things like manufacturing operations, corporate functions, chemical reactions, or computer programs work, rather than how to do things.

Processes may be included in your training as “nice-to-know” information or as essential to performing the job. Processes are especially appropriate for new hire training, trouble shooting, customer service, and sales -- the “big picture stuff.”

Processes and procedures are similar in that they both outline a flow or sequence. They are quite different, however. While procedures are **DIRECTIVE** in nature, processes are **DESCRIPTIVE**. Procedures tell employees how to go about doing a task. Processes describe to employees how something works.

We teach processes for three primary reasons:

- To provide a context for learning. Knowing “the big picture” provides a context for more detailed procedures and concepts. This improves the training and retention.
- To help employees troubleshoot and problem-solve. For example, teaching newly hired auditors the flow of claims from beginning to end may help them determine why certain claims are being processed incorrectly.
- To help motivate employees. Most people like to know how what they do fits into the bigger scheme of things.

## Examples of Processes

The following are examples of processes:

- The sales process.
- The manufacturing process.
- The claims adjustment processes.

## Process Non-Examples

The following are NOT examples of processes (with explanations of why they are not):

- The log-in process (more than likely, logging in is a series of discrete steps – a procedure)
- Techniques for handling angry customers (while there may be a procedure – a series of steps – for handling angry customers, the techniques/guidelines for handling the angry customer – listening/paraphrasing, displaying empathy, using open probes, etc. – are principles, not processes.)

## How to Teach Processes

At the Remember level, students can recall the major stages of the process. At the Apply level, students can solve a problem or make an inference based on their knowledge of how the process works.

If the process is essential, make sure to write an objective for the process and teach the process at the application level. For example, rather than having students “describe the network routing process” you may want to have students “diagnose common problems in the network routing process”. This moves learning from the Remember level to the Apply level – a level that is more relevant to the student’s job.

Learning objectives should begin with the application-oriented verbs such as: create, generate, develop, formulate, and propose. Move quickly from remember-oriented verbs such as: explain, describe, and identify.

Learning activities should include case studies, simulations, and work problems.

Use informational displays for processes such as process tables and flow diagrams. Flow diagrams are preferred as they are more memorable and more efficient. (A flow diagram consists of a series of boxes or bubbles or titles depicting primary functions or elements in the process.)

To practice/apply process knowledge at the Apply level, ask students to solve a problem or make an inference based on the process. Use case studies, simulations, or work problems to apply process knowledge.

The suggested learning/teaching sequence is as follows:

1. Outline the process.
2. Explain why it is important to know this process.
3. Give a common example to illustrate how the process works.
4. Give a problem and ask the class to solve the problem.
5. Ask students to solve a problem or make an inference based on the process.
6. Provide feedback.

### How to Assess Learning

To evaluate process learning, measure the student's ability to solve a problem using the process. Especially useful for evaluation are simulations and problem-solving scenarios. Use role-plays to combine process learning with principle learning.

In upcoming issues of *The Key*, we'll finish our discussion of content types by looking at facts.

This information comes from *High Impact Training*, a module in Entelechy's *High Performance Training* program. Much of the general information is provided free of charge at <http://unlockit.com/improve.htm>. If you want more detailed information on this skill and others from our *High Performance Training* program, please visit our website at [www.unlockit.com](http://www.unlockit.com) or contact me directly at <mailto:ttraut@unlockit.com>.

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### WELCOME TO OUR NEW MEMBERS

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I just checked our email list and we've grown by another 20 people! Thanks to all of you readers who have passed on Entelechy's information to your friends and colleagues. Our goal is to continue helping you increase the performance of your employees by providing you with:

- Practical training tips and techniques via the website, newsletter, and eGuides (<http://unlockit.com/eguides.htm>)
- Customizable training programs in sales, management, customer service, and training via our downloadable training programs (<http://unlockit.com/programs.htm>)



- Customization services to augment your own design, development, and delivery capabilities  
([mailto:ttraut@unlockit.com?subject=I\\_Want\\_Help\\_With\\_My\\_Training](mailto:ttraut@unlockit.com?subject=I_Want_Help_With_My_Training))

Let me know how we're doing. And then tell a couple friends and colleagues about Entelechy.

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MAILING AND PRIVACY INFORMATION  
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Send this email to your friends and colleagues who may be involved in training and the performance of others and could benefit from FREE performance tips, tools, and techniques.

Entelechy will not sell, rent, or otherwise provide anyone else your membership information for any reason. Period.

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