Tackling Training: Is it For You?

Providing training is a good way to market your services and skills and get to know your clientele, but there are many considerations to take into account before you begin.

By Denise Chochrek, MLIS

Information specialists wear many hats. I love to go to benchmarking sessions and listen to people in our field talk about their many job responsibilities. Most of us conduct and/or manage research, but beyond that, our job descriptions often vary quite a bit.

One responsibility that often comes up in these discussions is training. Training is a broad term that can mean different things depending on the size of the department, the amount of money available, and the resources that can be used to support this function.

Choosing Training Content
The first question I asked myself when I started writing this article was this: Which subject areas are appropriate for information specialists to teach? By clearly answering this question, we can easily rule out subjects we should not teach.

Appropriate teaching content includes the following topics:
- How to use databases;
- How to use the Information Center portal and other IT tools connected to organizational knowledge;
- Information for new hires;
- An overview of the information team;
- The special competencies within your department; and
- Tips on expanding the research skills of employees.

Teaching employees how to use databases is an easy win. Most of us keep metrics on how frequently our databases are used, so providing database training helps us increase usage while also educating potential users. When conducting database training, be sure to address the following questions: (1) Do you want to conduct the database demonstration yourself, or do you want the vendor to do it? and (2) How will people view the demonstration?

The advantage of conducting the demo yourself is that you control the content and determine the terms that will be used in your examples. The advantage of having vendor representatives conduct the demo is that they know the database in detail and can provide insights and reveal shortcuts you may not know about. Even if you let the vendor conduct the demo, make sure you handle the introduction, then guide the conversation as needed and position yourself as the contact for future questions.

Information professionals are also ideal for training employees to use the organization’s knowledge portal and introducing new hires to organizational services and resources. Remember that new hires are being drowned in content when they first arrive, so let them...
catch their breath before scheduling any training. (I always give new hires at least a week to settle in before setting up training.) I also suggest you reconnect with them a month later to remind them where to go and whom to ask for information.

Sometimes, training can be used to advertise the Information Center. For example, perhaps you have people on your staff who provide competitive intelligence services. Set up a “What is Competitive Intelligence?” session in which you describe the CI services that are available through your office, provide examples, and explain how to procure these services. Schedule additional training sessions to educate employees on the other specializations your department supports.

Another great training opportunity is to provide “How To” sessions on research skills. At PepsiCo, there is a strong learning environment, which my staff and I help foster by making it easy to sign up for training opportunities. We use these opportunities to provide training on topics such as how to search patents and how to be an advanced Google searcher.

Think about your organizational environment for a moment. What tools are employees using to conduct research? Are shortcuts available that would make searching easier? Are employees struggling to find information from government or university sites? Is your company global? If so, do employees know what resources to use (both internally and externally) that are specific to their region?

If you answered yes to any of these questions, you have an opportunity to provide training. But training need not always be conducted by the Information Center; other departments, such as Human Resources and Information Technology, can provide training, as can external consultants. If a training topic does not pertain to the Information Center’s resources and services, such as managing difficult people or how to use Oracle, it is best to refer the training to the appropriate department.

So, how do you decide whether you should take ownership of training? The matrix below can help you make that decision.

Note that leaving education to other departments or external consultants means that you will not be able to control the conversation. Part of what makes us powerful trainers is that we are familiar with the research needs of our employees, we know where the resources are, and we can direct people to the right services.

Getting Started
When I decide to conduct a training session, I usually begin by determining what should be covered. Be careful not to put too many subjects into one training session, unless you like seeing “glazed over” looks on the faces of your students. Make sure you have a good balance of overview and detail in each session.

In most cases, you will be teaching beginners—people who are new to the subject content. You can teach advanced sessions as well, but no matter what you teach, you must be clear with employees about what they should expect.

The next step is determining the training format. Will the training be conducted in person? Can employees use WebEx, Skype, or some other conferencing tool to attend the training? Is the training going to be held at a specific date and time? Is this a stand-alone course that employees can take online and complete at their leisure?

When deciding which format to use, it is important to consider who will attend the training. Before joining PepsiCo, I was employed by a small investment firm where everyone worked in one building. It was easy to gather people together in a conference room and conduct a training session. If you work in a large company, in-person training might not be feasible.

When conducting training for a global audience, you must take time zones, international holidays, and work habits into account. When I first started scheduling training sessions at PepsiCo, I learned that coordinating training for multiple countries can be difficult. In some countries, employers don’t schedule meetings before a certain time of the day, or workers take afternoon breaks, or the work week might not be from Monday to Friday. There could also be language or technological barriers—employees in some locations may not have access to the same IT tools as employees in other locations. Take time to learn about the customs in countries where your employer has worksites before you start scheduling training.

If you are thinking of creating an online course from scratch, you must address several considerations. First, creating a training course can be costly, as can hiring external vendors. Find out if there is something that already exists in-house that you can use.

Next, you must determine how complex you want to make the session. Sometimes editing software can be enough to add complexity—for example, you can film an employee conduct-

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<th>Information Center Training: Pros</th>
<th>Information Center Training: Cons</th>
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<tbody>
<tr>
<td>Control of content</td>
<td>Could take considerable time</td>
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<tr>
<td>Great publicity for your group</td>
<td>May require manpower to focus on training</td>
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<tr>
<td>Results in better educated employees with the right material</td>
<td>Could be costs involved depending on format</td>
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<tr>
<td>Able to help shape resource use</td>
<td>Information Center staff may not be familiar with the training topic</td>
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<td>Good metrics</td>
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I would recommend classes on how to train and how to communicate if you have never tackled training before.

Tricks of the Trade
So, how do you make sure your training is successful?

One of the best tools for ensuring success is a pre-training survey. This can be a formal written survey, or you can interview potential attendees. The goal of the survey is to learn what trainees already know, how they currently conduct research, and what kinds of information they typically seek. With this information in hand, you can ensure that your training is customized to your customers.

Communication is key. Make sure the message is catchy; don't be verbose. A long e-mail will lose your audience. Remember to focus on what's in it for attendees—how they will benefit from the training. Make sure the date, location, time, and format are clearly communicated.

Also, be sure to include contact information on all communication materials. I often receive e-mails from employees who can't attend a session but are very interested in the topic. This is a great opportunity to reach out and make a personal connection. Perhaps you can record a WebEx session and send them the link after the training; if not, schedule a one-on-one meeting to train them yourself. This may seem time consuming, but it is a great way to build relationships with your clientele.

The follow-up is also important. I have already mentioned the need to follow up with new hires, but you should consider doing this with all training attendees. One way to follow up is by sending attendees a feedback form. Ask whether the training was useful and whether they have used the new skills or knowledge they learned. If they can provide examples, you can incorporate this information into future training communications.

If attendees report they have not used their new skills, find out why not. Was the training not valuable? Are they confused by the information they learned? If so, you have a great opportunity to correct that problem. By reconnecting with attendees, you bring the tools or services you discussed back into focus.

Simple takeaways can be very effective. When I conduct database training sessions, I give my attendees a one-page document that reminds them what the database is for, how to sign on to it, and how to perform basic searches. If they forget what they learned in the class, this one-pager will help remind them. As always, make sure your contact information is on this document so users can reach out to you if they have questions.

Training vs. Library School
How does on-the-job training differ from what library students learn? The real difference is that training in library schools tends to be more general in nature. I teach a business research course at the University of North Texas in which I discuss public companies, SEC forms, and industry research. This is a great first step.

When these students get hired by a company, university, or other institution, they have to conduct research in a specific field. The requirements of their job are much narrower and deeper than in a classroom. Suddenly, they don't know which databases to use, what the best resources are, or how to find information internally in their new organization. This is why the Information Center is perfectly suited for bringing new hires, even in our field, up to speed.

Learning is a never-ending part of our job. We constantly need to learn to succeed in our jobs; it is critical if we are going to train others. I would recommend classes on how to train and how to communicate if you have never tackled training before.

If you are a junior member of your team, make sure you tap the experience of those around you who have conducted training sessions before. I also suggest you spend some time learning about your training topic. There is nothing worse than teaching a subject and not knowing the answers when your audience asks questions. This does not mean you have to know all the answers—if there are one or two questions you can't answer, write them down and make sure you follow up later.

Finally, make sure you practice before you conduct any training. You will feel more comfortable and be able to make sure you have timed the training session correctly. And don't forget to smile. Training can be a tense experience, but don't let your audience know that. Take a deep breath—you can do this!