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# Training by design

By Lela D. Johnson, JD, CCEP

Lela D. Johnson (ldj98@comcast.net) is an Assistant United States Attorney and Regional Director in the United States Attorney's Office for the Northern District of Illinois in Chicago, Illinois, USA.

Training your board of directors and employees is sometimes considered one of the most important tasks in compliance. Why? Without training, all the risk analysis, policy-making, and information gathered through investigations will have little to no effect on future compliance. This article will show you how to better educate your teams by providing a framework to help you design your training.

## Training by design

How do you train people? The honest answer is, it depends. Who are you training, why are you training them, and what do you want them to get out of the training? Focusing on the design of your training will lead you to more effective education.

The cornerstones of your design are:

- Audience
- Objective
- Activities
- Structure
- Content
- Delivery

Creating your design requires you to answer the following questions:

- Who is your audience?
- What is it that they need to know or do better as a result of training?
- What activities will allow them to demonstrate their understanding?
- How will your session be structured?
- What is the critical content needed to support the objective?
- How will you provide the training?

Although your basic objective will be the same for each group you train, how you get there is likely to vary.

This may be easier to understand with an example in mind. Here is a hypothetical scenario for the purpose of this article:

> One of your employees unintentionally disclosed proprietary information regarding a new product. The disclosure was investigated, and you learned that the employee did not know that the information was proprietary nor that telling a vendor was inappropriate. You reviewed the policies and determined that there was nothing addressing the disclosure of new products or related information.
>
> The legal team drafted a new policy to reduce the risk of disclosure of similar proprietary information. It is your job to train the entire company, including the board, C-suite, sales, procurement, manufacturing, and administrative staff on this new policy. You have been given six months to have the entire company trained on this new policy.

How do you start? Would your first step be developing a PowerPoint presentation focusing on the words of the policy? Of course, you would first translate it from legalese. If you start there, you are getting ahead of yourself. Content does not form until later in the design. When designing training, it is important to first know who your audiences are, what your objectives are for each audience, and how you can demonstrate and augment their understanding of the policy.

We will start our discussion of training by design by looking at who your audience is, what your objectives are, and what activities will help you meet your objectives. Our hypothetical company breaks down into six different audiences. Thus, you may have as many as six different training designs.

## Audience

How do you know how to communicate this policy to six different groups? Do you communicate the message the same way to each group? Do you know how this information will affect each group? How do you develop training for people when you have little information as to how the new policy touches their jobs?

Reach out to each group and invite a representative to join your design team. The design team doesn't have to meet all together. The team members are those individuals you have identified as go-to people for their group. Talk to each of them about how the new policy might apply to the people in their groups.

Once you have identified your audience and learned about how the new policy will affect them, you can then move on to setting your objectives.

## Objective

Your objectives may differ somewhat for each group depending on how the policy affects them. What do they need to know? Of course, they need to know that they should not disclose proprietary information. However, what does that mean for each of your groups? You may need to explain the policy in slightly different ways for each group. How do you determine what your audience needs to know? You use what you learned from your design team to draft objectives. Once you have a draft, meet with each member of your team again to ensure that your objectives focus on what each team needs to know about the policy.

Using our example, the following may be some objectives for your training:

- What is proprietary information? (Board and C-suite members may not need much information on this objective.)

- How will they know something is proprietary? (Your policy explains how proprietary information will be identified within your company. Example: All memoranda regarding proprietary information will be marked “Proprietary” and distributed on pink paper.)
- With whom can the individual discuss the proprietary information? (For some groups, it may be more effective to identify with whom they cannot discuss the information.)
- What happens if they violate the policy?
- What should they do if they believe someone else violated the policy?
- What protection do they have if they report someone?

Your manufacturing groups may never see the proprietary information in written form. How will they know what is proprietary? This is something that you should talk about with your manufacturing design team member.

Recognizing early on that you have a significantly different group allows you to consider this different angle before preparing your presentation.

## Activities

During your presentation, how will you know if your information is getting through to your audience? As part of your presentation, you should create activities that allow the audience to demonstrate that they understand the objectives. Activities also serve to reinforce the information provided.

Some examples of activities are:

- **Group question:** Ask a question for anyone in your audience to answer (e.g., Who knows what proprietary information is?).
- **Multiple choice question:** Ask a question to the group and provide a short list of possible answers. Ask people to raise their hands for each of the answers before revealing the correct answer. Ask a few members of your audience to talk about why they chose one answer over another. If the person chose the wrong answer, be kind. Pay attention to their reasoning. It may help you understand how to explain your point more clearly (e.g., Is the existence of an unreleased new product proprietary?).
- **Ask your neighbor:** Pose a question or situation and ask the audience to discuss it in groups of two or three people. Give them a specified amount of time to discuss. After that time expires, seek volunteers to tell you what they learned or decided (e.g., What would you do if you believed someone improperly disclosed proprietary information?).
- **Working group:** Pose a question or problem that requires thought and discussion. Ask your audience to break up into groups of four or five and discuss the problem. Once the time period is over, have each (or a sample) of the working groups share what they learned or decided (e.g., What are some of the ways proprietary information can be shared inadvertently?).
- **Written response:** Ask a question and then ask the audience to provide a written response. After the allotted time, select a few people to share their answers (e.g., Write down three people you can speak to about proprietary information.).

Something to keep in mind when you pose questions to the audience: Give them time to think about the question and develop an answer. During that time, do not continue to talk to them. Be patient.

Some activities may be limited by your method of delivery, but some can be adapted to any delivery method. The activity should also be specific to your audience. The activities will likely vary based on the group you are presenting to. Seek guidance from your design team on what activities may work better with their groups.

Now that you have identified who you are training, what they need to know, and how you will know if they are learning, let's move on to the substance of your presentation. We will look at how you are going to formulate your information, what specific information you will provide, and how you will convey the information.

## Structure

When determining your structure, start with your objectives. Try to organize your objectives into groups of three. Organizing your content into related groups of three will allow your audience to learn and retain the information more easily. Make sure that the information flows logically, not necessarily in the order in which it appears in the policy.

Our example can be broken down into two sets of three. The first section relates to the terms of the policy, and the second section relates to consequences of violating the policy.

When developing your structure, take into account time constraints and your audience's ability to pay attention. If the training exceeds an hour, each segment should be no more than 45 minutes. You can split a longer segment into multiple parts. Your structure must also take into account time for your activities within each segment. Even if you have a one-hour presentation, you should structure in time for an activity. Keep the audience engaged, and make sure they are achieving your objectives. If you can, you should also vary the activities.

## Content

What does each audience need to know in order to keep proprietary information safe?

This is the time for you to put together the substance of what you want your audience to know. You can start drafting your slides. The content should closely follow your objectives (e.g., the first slide or first few slides should define "proprietary information.")

In designing your content, you should keep in mind that simply repeating everything that is in the policy is likely to overwhelm some of your audiences with information they do not need to process. Your content need not follow the policy verbatim as long as you convey all the relevant parts in whatever order best suits your group.

For each segment, design an activity that allows your audience to show that they understand what you are trying to convey.

As we discussed earlier, the training will likely differ for some of your six groups. The training for the board and C-suite will likely be similar, with only minor adjustments. The board and C-Suite training will differ from what you design for the sales, procurement, administration, and manufacturing groups.

If you have to prepare the content for a different language, be sure to have a native speaker review your entire presentation for that group.

## Delivery

Decide what media you will use. Will this be a live presentation? Will it be a video presentation? If it is a video, can you make it interactive? If it is live, will you use a slide presentation? Will you have handouts? When will you provide the handouts and/or slides—before or after the presentation? These are all elements you must consider when designing your training.

Depending on the dynamics of your organization, you may be limited. If you have the option, live is the best delivery form. The presenters have the ability to take cues from the audience, determine what activities work best with the particular audience, and modify the presentation to fit the audience.

Who will present? If you have a one-hour presentation, one or maybe two presenters will keep the audience interested. If you have more time, feel free to use more presenters. To the degree possible, you should choose presenters from the same group as the audience. A local presenter serves two purposes. First, you have a familiar person talking to the audience. Second, you create a local contact for any questions regarding the subject of the training. There are instances that you might consider having someone from headquarters or the C-suite present, or at least introduce, the presenters. Having someone from headquarters/C-suite present shows the importance of the topic to the company.

When you deliver the training is another element of your delivery design. Do you attempt to have everyone trained at the same time? Whom should you train first? What does your risk analysis suggest about who needs the training most?