

A well-orchestrated training initiative begins with a well-structured facilitator guidebook.

Orchestrating the Learning Event

BY RICHARD V. MICHAELS

A concerto is a musical presentation that typically consists of three parts, called movements, and it often features a soloist accompanied by an orchestra. The concerto's effective orchestration results in a blend of contrasting and complementing musical pieces that creatively satisfy the audience. There are multiple similarities between a well-orchestrated concerto and a well-orchestrated learning event.

Sheet music

All well-run orchestrations require sheet music. It is the glue binding the composer who created the concerto to the maestro who leads it, and the orchestra and soloists who play it for the audience who listens to it. Without an effective implementation of the concerto's sheet music, the vision and artistry of the composition is lost.



For learning events, the sheet music equates to the facilitator guidebook. A well-constructed guidebook helps ensure consistent delivery and expected outcomes. It must serve two important functions:

- preparation (study and practice)—where we learn what to do and when
- execution (live action job aid)—where we follow our plan of action.

Guidebook structure

Organizing the guidebook for those two important functions can be a challenge. Adding to the complexity is the guidebook's intended audience.

Guidebooks are not just for classroom-based learning events. A version can be created for nearly any event type. The most common form of use is by the traditional classroom facilitator. Beyond this environment, there may be a need for guidebooks for facilitated webinars or for managers overseeing certain structured learning activities of their employees.

These types of guidebooks focus on learning transfer on the job. Another category of guidebook is created especially for the self-directed learner, who serves as the maestro for her own personal learning concerto.

Whether a guidebook is intended for traditional classroom events, webinar facilitators, managers, or self-directed learners, the general structure is similar. The components that all guidebooks should include are

- About the Guidebook
- Program in Perspective
- Program Preparation
- Program at a Glance
- Program Content
- Index and References.

Closer focus

The descriptive names of each com-

ponent should explain its purpose, but there are a few that could use further exploration.

About the Guidebook. Guidebooks need to be visual as well as detailed in their written content. Visual cues are those snap reminders of “What am I supposed to do now or next?” Without them the guidebook is just a study guide and pretty useless as a job aid.


Program Preparation. The prework subcomponent typically is a bulleted list or short reminders of what participants are supposed to complete before the learning event takes place.

Program at a Glance. This section is the transition piece that bridges the general background information used for preparation to the more detailed guidance used for execution. This component is best organized as a three-column, multirow table.

Column 1 is the module name or major content topic (think: concerto movement). Column 2 is the length of the movement. Column 3 is a brief, one-paragraph description of the movement. Each module in the concerto has a row in the table.

Program Content. This is the main body of the guidebook, and it is parallel to the musical score of a concerto. Like concertos, there are usually at least three defined content modules for every learning event. Within each module, there are individual lessons or subtopics. Modules correspond to the objectives of the event, and the lessons are designed to teach to those objectives.

A module begins with a page of information containing the objective, time to complete, descriptive overview, and required materials. Following this is the detailed sequential score of the lessons. Each lesson can be broken down into two core blocks of data: the lesson objective and the time to complete.



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Content blocks are the individual chunks of instructions or information for the guidebook reader to use. The sequence of content blocks and the instructional script within are unique for each lesson in the module.

For the guidebook, format each content block as either a two- or three-column table. The first column offers a visual cue to identify the type of content in the lesson. The second column contains details regarding what the facilitator is to know, do, or deliver. If a third column is provided, it can be used for reader notes, delivery tips, or facilitator or producer directions.

Common content blocks include assessment, case study, computer, flipchart or whiteboard, group activity, handout, instructional game, key points, lab exercise, Q&A, role play, transition, video, audio, and workbook.

Finale

There are many factors that make a concerto successful: the overall design of the concerto, the skill of the composer, the skill of the maestro, and the collective and individual skills of the orchestra members. They all have significant roles to play. And through it all, directing every change in tempo, emotion, and note of substance, is the concerto's binding notes—its sheet music.

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