How to Create Effective Training Manuals

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Welcome

These guidelines have been written for a training context in which a training manual will be the main delivery source for the educational experience. The manual will neither compliment a stand-up trainer nor will it be downloaded from an Internet training session. Instead, this training manual will be used as a self-study tool. While most of the guidelines also hold true for a training manual that compliments a stand-up or Internet delivered training, the focus of these guidelines is on a self-study manual. For more information about an instructor-led manual, see the Appendix.

Pre-requisite Skills

This manual is written for an audience that already is familiar with front-end analyses. You should know, at the very least, how to carry out a task listing and how to construct a structured lesson. You should also have the skills to do screen captures, usability testing, and creating documents in Word software.

Introduction

The purpose of this manual is to guide instructional designers on how to create effective training manuals. The benefit of learning this information is to create professional looking educational tools that will serve your clients well. It is important to implement the information within this manual in order move your clients to optimal levels of performances.

Objectives

At the end of this lesson, you will be able to:

- Write a training manual;

- Edit a training manual; and,

- Appropriately bind a training manual.

Outline

Complete a Front-end Analysis

Divide the Contents into Modules

Select a Style Manual

Creating a Training Manual

Edit a Training Manual

Bind a Training Manual

There are three steps you should take before composing your training manual. These steps are similar to designing any other performance improvement intervention.

Step 1: Complete a Front-end Analysis

Before writing a training manual, you should have completed some type of front-end analysis, including task analysis. By doing so, you will have created, at the very least, a task listing of terminal and enabling objectives for the cognitive and behavioral tasks you plan to teach within the training manual. You should also have a list of performance objectives that manifested from the task listing. The task listing and performance objectives will guide the outline of your training manual. The outline should follow the task listing in the sense that all pre-requisite skills should be presented before more advanced skills.

Step 2: Divide the Content of Your Training into Modules or Chapters

After outlining the content domain of your training, divide the content of your training into modules or chapters. Each module will then be set-up as a structured lesson.

Step 3: Select a Style Manual and Prepare a Style Sheet to Ensure Consistency

There are a few style manuals to select from such as the American Psychological Association (APA), the Modern Language Association (MLA), and the Chicago Manual of Style. All three of these manuals offer extensive guidelines on how to present information, including how to cite rights and permission, grammar and usage, punctuation, spelling, names, numbers, foreign language, quotes, illustrations, tables, math, abbreviations, references, indexes, and more.

A style sheet helps the writer ensure that the training manual looks consistent. For example, if the main headings are Arial, 14 point font and the sub-headings are Arial 12 point font, then all main and sub-headings should follow suit. The manual would look less professional if some of the headings were Arial 14 while others were Times New Roman 12, or if the sub-headings were listed in various font sizes from 10 to 18.

Besides listing heading sizes, the style sheet notes the rules the writers and editors will follow. For example, if there is special punctuation used or unusual terminology, then the style sheet would note the guidelines to follow for these cases.

Step 1: Write the draft of the Training Manual

When writing your draft manual, implement the following tips.

A. **Chunk material** into shorter; albeit logical, sections. **Connect sections with transitions**.

Trainees will be overwhelmed by huge amounts of text group together. To reduce their anxiety and engage them in your training materials, create shorter paragraphs. Place the paragraphs in logical order. As you present your information, you want to chunk your ideas into units or what would be in writing, a paragraph. A paragraph typically possesses four elements.

1. A main idea.

2. *An explanation of the main idea, i.e., the presenter's rationale.*

3. *Examples and/or non-examples to illustrate the explanation.*

4. A completion of the idea and transition into the next topic.

EXAMPLE

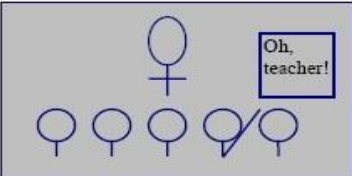> **Innovative Practices for Needs Assessors***
>
> Needs assessment is one of the most important processes to implement before activating any intervention. Surveys, focus groups and interviews are the traditional assessment apparatus used to uncover performance gaps. To utilize these tools optimally, blind obedience to what has been done in the past can sabotage present objectives; and instead, implementing contemporary ideas is paramount. This presentation introduces innovative practices which were executed during a needs assessment to determine if building a health center was essential to an Illinois community were loss school days and emergency room visits were costly.

In additional to presenting ideas in cohesive chunks, incorporating effective transitional statements will help your audience better understand how you are moving from one idea to the next. Transitions are frequently made up of transitional devices.

A transitional device cues the listeners to a connection between thoughts. Below are some examples.

Transition Devices	Example Words Used
Addition	and, in addition to, furthermore, moreover, besides, too, also, another, equally important, first, second, etc., again, further, next, likewise, similarly, in the same way
Illustration	thus, for example, for instance, namely, to illustrate, in other words, in particular, specifically, such as
Emphasis	above all, of course, certainly, surely, in fact, really, in truth, again, besides, also, furthermore, in addition
Examples	for example, for instance, to illustrate, thus, in other words, as an illustration, in particular
Suggestion	for this purpose, to this end, with this in mind, therefore
Summary	therefore, finally, consequently, thus, in conclusion, in brief, as a result

If you are doing a procedural manual like this one, then make sure the steps are in logical order. In other words, you want to define terms and concepts before you require the trainees to analyze or apply steps. Use examples frequently to explain what you are communicating. Mix up you examples by using illustrations, case studies, games, etc. You may wish to incorporate an action table as illustrated below.

HOW TO CARRY OUT A BEHAVIORAL FREQUENCY COUNT

Now that you understand what a behavioral frequency count is and when to use it, next you will see the steps needed to carry out this technique.

Here are the steps to follow to carryout out a behavioral frequency count.

STEP	ACTION	EXAMPLE
1	Select and define the behaviors to be observed and counted.	Lecturing- a discourse read or delivered before an audience. Observe: teacher delivery style Count: student participation
2	Go into field, count, and record the occurrence of behavior for a specific time.	Oh, teacher!

When describing procedures make sure you don't leave out steps that may seem like common sense to you but may not be to the novice user. If you have successfully completed a front-end analysis, then you should have a good idea on how much your learners know as well as what they don't know. Moreover, encourage trainees to think about their own past experiences in order to aid them in engaging in and applying the new knowledge presented in the training manual.

B. Make sure the **writing is easy to read**. Avoid jargon when possible unless you have defined those unusual terms before-hand. **Use the active voice**. Be consistent in tone and style of writing.

EXAMPLE

Active Voice: Sally wrote a training manual

Passive Voice: The training manual was written by Sally.

C. **Leave white spaces** between chunks of ideas and other logical groupings. White space makes the material look less intimidating.
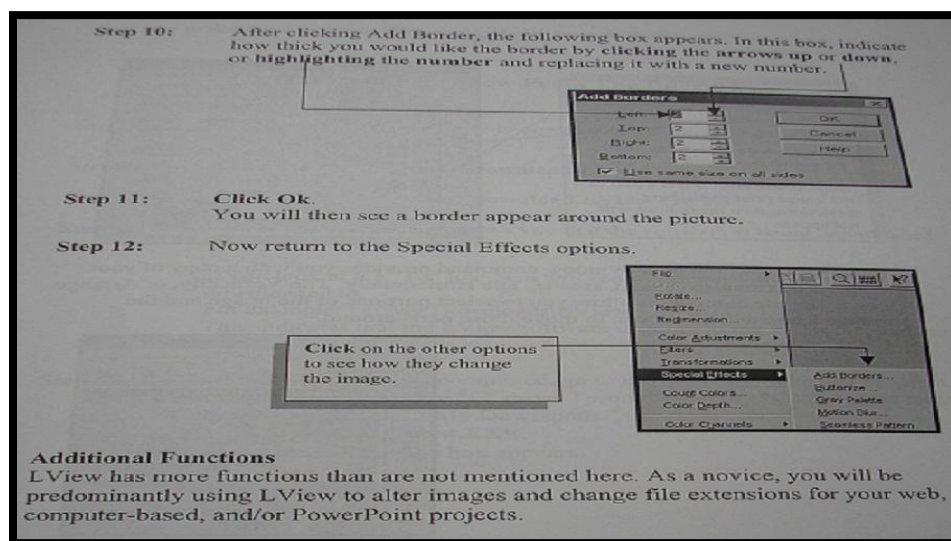

D. **Use images** to enhance the writing. You know the saying, "*A picture is worth a thousand words.*" Use images that further enhance your message.

E. **Use bullets** to offset text. Using bullet points helps the readers see important information.

F. Create a **visually appealing** manual.

- Lay the pages out in a manner that attracts the reader to the manual.

- Select font styles and sizes that are easy to read.

- Use chapter and/or module dividers, especially in a color that offsets the pages.
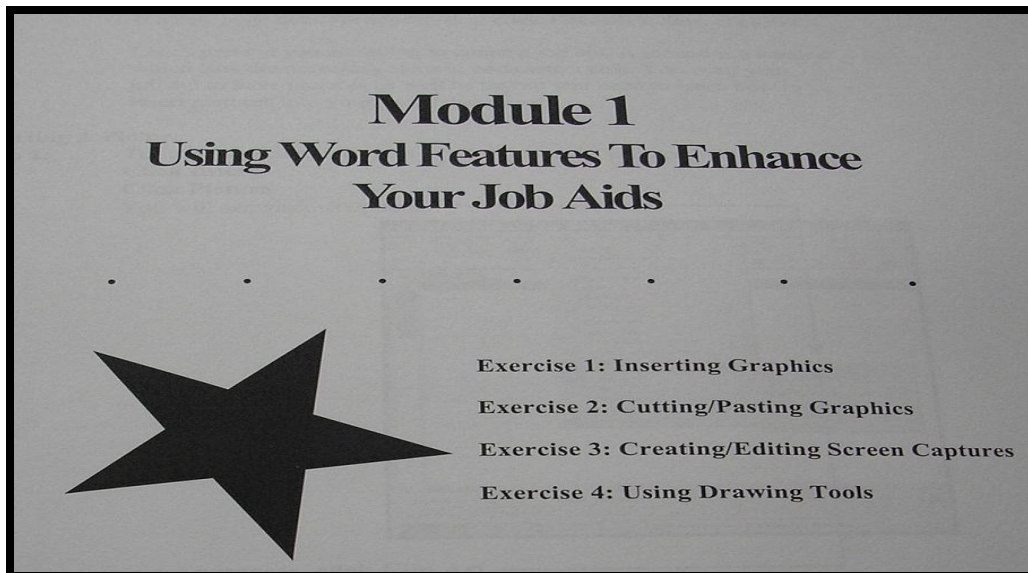
G. Provide **practices and feedback** throughout. A quality training manual always provides the trainees with a number of exercises and/or practices of the materials. Along with practice is feedback. The trainees need communication mechanisms that tell them how well they are doing.

Practice Exercise for Step One

In the Appendix, you will find a quiz to test you on the information presented so far.

Step 2: Edit the Draft Training Manual and Complete Usability Testing

Edit the draft manual to make sure the contents are accurate, clear, and comprehensive. After editing your manual a number of times, next test the materials on people who are like your trainees. Complete usability tests to make sure the training manual is fully functional.

## Step 3: Finalize the Training Manual by Adding the Front Contents

Write the introductory materials for the training manual such as the title page, publisher and copyright page, things to note page, and table of contents.

Title page: State the title, sub-title if the manual has one, and author's name.
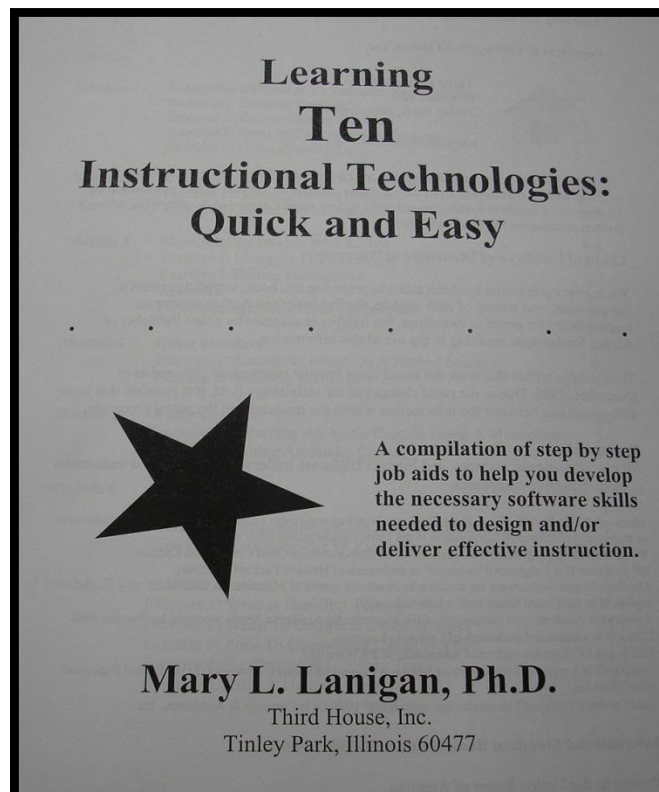
You may also wish to state the company and organizational location on this page.

Publisher and Copyright page: State the manual title, the copyright symbol along with the publisher or author's name (depending on who owns the copyright), the company's name and address as well as the URL if appropriate.
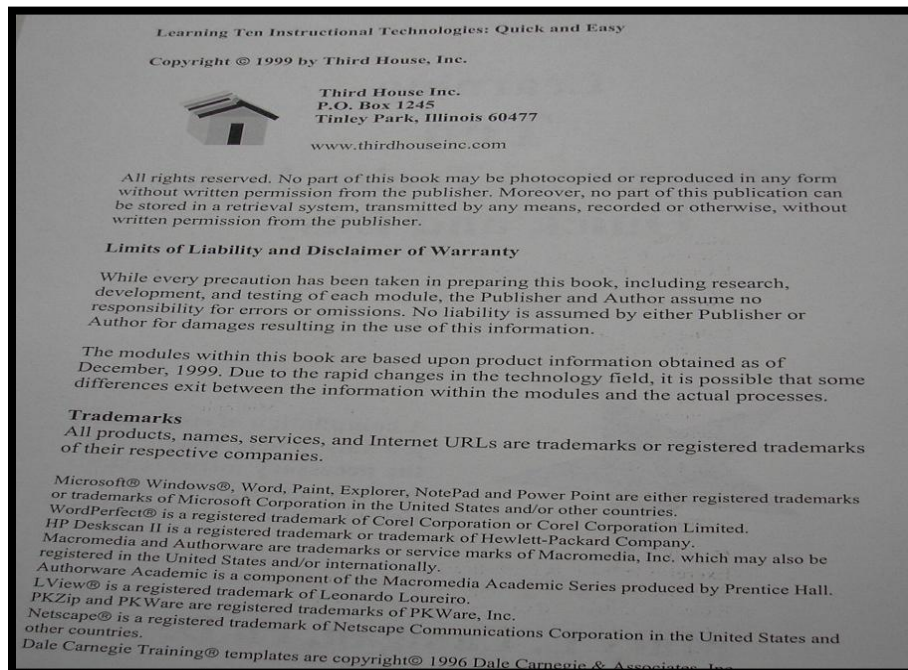
You want to include a paragraph reserving your rights. You need to stipulate what rights, if any, you wish to reserve.

Indicate the liability limits, if any. Also, indicate any warranties or disclaimers.

If there are trademarks used, then you want to indicate those. You want to list the company name and the trademarks they hold.

You may also wish to indicate where the manual is printed. Moreover, if you have an International Standard Book Number, then indicate the ISBN number.

Table of Contents: You want to include a detailed *Table of Contents* that includes chapter headings, main headings, and sub-headings.

Contents

Things to Note or Preface: There are a number of items you may wish to include in this page. Here are some examples.

A. What is the purpose of the manual?

B. What equipment and/or materials are needed beside the manual to complete the training?

C. Any pre-requisite knowledge and skills necessary to complete the manual. This might include a glossary of terms, if needed.

D. List any obstacles a trainee might uncover and how to overcome these problems. If you are teaching highly technical skills such as providing software skills, then you may have an extensive trouble-shooting section in the back of the manual. If you provide such an addendum, then note that in the preface page so the trainees know where to look for this information.
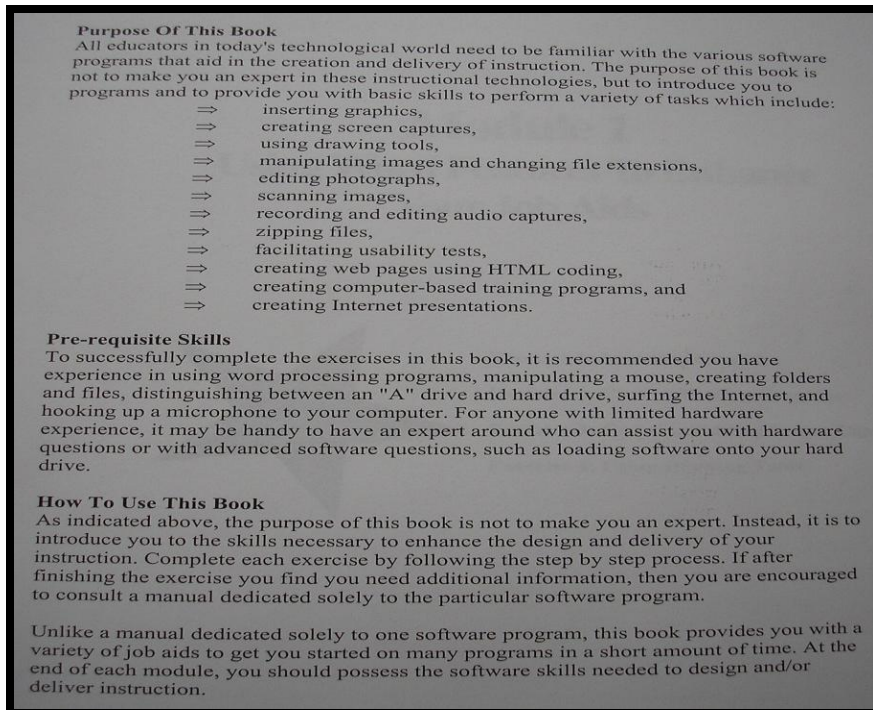
E. Encourage trainees to follow the order of the manual in order not to miss any pre-requisite skills.

F. If you have a help resource person, then tell the trainees how to contact him or her.

Practice Exercise for Step Three

Answer the questions below. To see if your answers are correct, go to the Appendix.

1. Name four pages that come before the main body of the training manual?

2. Besides the copyright and author or publisher information, name two additional items that might appear on the *Copyright* page.

3. Name six items that might appear in the *Preface* or *Things to Know page*.

Step 4: Finalize the Training Manual by Adding the Back Contents

Write the back contents for your manual. The contents in the back of the manual include: Addendum; References; and Index. You need to decide if you wish to have individual addendum and reference sections following each module, or if you want one large addendum and reference section for the entire manual.

Appendix or Addendum: Each Addendum section is unique. See the Appendix in this manual to see an example.

References: The reference section should be designed and written following the guidelines of your style manual. For example, if you use the APA manual, then your references would look something like the example below.

References

Ajzen, I. (1985). From intentions to actions: A theory of planned behavior. In J. Kuhl & J. Beckmann, (Eds.), Action-control: From cognition to behavior (pp. 11-39). Heidelberg: Springer.

Ajzen, I,. & Madden, T. (1986). Prediction of goal-directed behavior: Attitudes, intentions, and perceived behavioral control. Journal of Experimental Social Psychology, 22, 453-474.

Bandura, A. (1977). Self-efficacy: Toward a unifying theory of behavioral change. Psychological Review, 84, 191-215.

Bandura, A., & Adams, N.E. (1977). Analysis of self-efficacy theory of behavioral change. Cognitive Therapy and Research,1(4), 287-310.

Index: A detailed index helps trainees find information quickly. The index is optional depending on how detailed the manual is. There is also a cost factor involved, in that, indexing takes time and money. Therefore, consider if an index is cost-effective to have within your manual or not.

Step 4: Bind the Training Manual and Attaching Ancillary Items

You want to bind the training manual in a way that is most suitable for the user. For example, if the user needs to position the manual flat on a table while working on a computer, then perhaps a **spiral bound manual** might be the best binding.
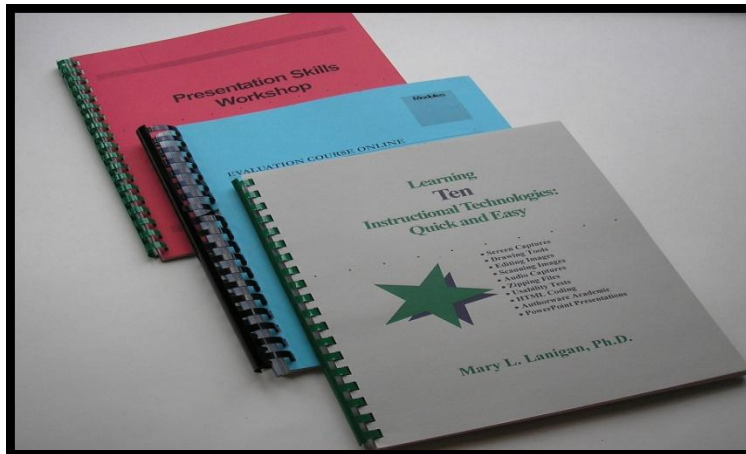
On the other hand, if the trainee is going to refer back to the manual frequently, then the spiral bound manual may be prone to rips and tears. If durability is more important than being able to lay the book flat, then a **book binding** may be more appropriate.
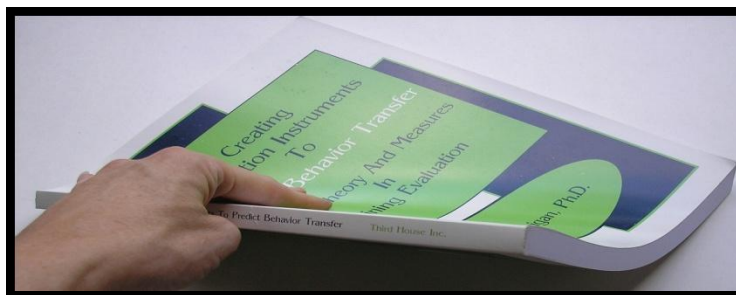
A book-type binding doesn't allow for quick updates or changes. Therefore, if you need a training manual that can be pulled apart and new information added, then a three-ring binder may be the best option.

In addition to the binding, you also want to consider if the training manual is going to house other things such as CDs, job aids, etc. If you are including a CD with the manual, determine how you will house the CD. For example, do you want to buy stick on CD holders to attach to the back of the manual?

Perhaps, you might buy a CD holder that has a three ring attachment. Or, you might wish to consider if you are including additional information such as job aids or maps or other like products, then you need to consider how the training manual will house those materials.
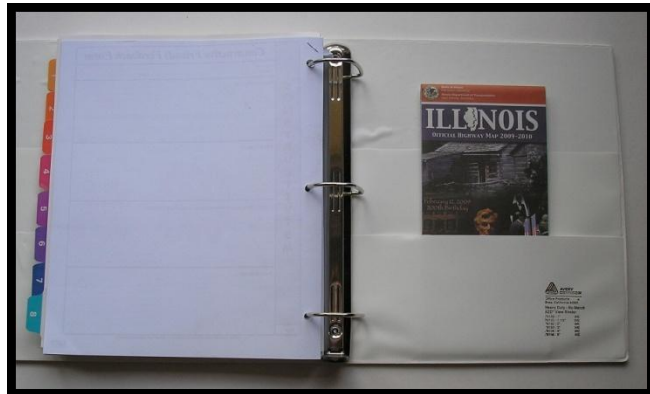
Finally, consider any information that might be needed on the back cover of the training manual. A summary of the books content, highlights, the ISBN number, and price are often listed on the back cover.
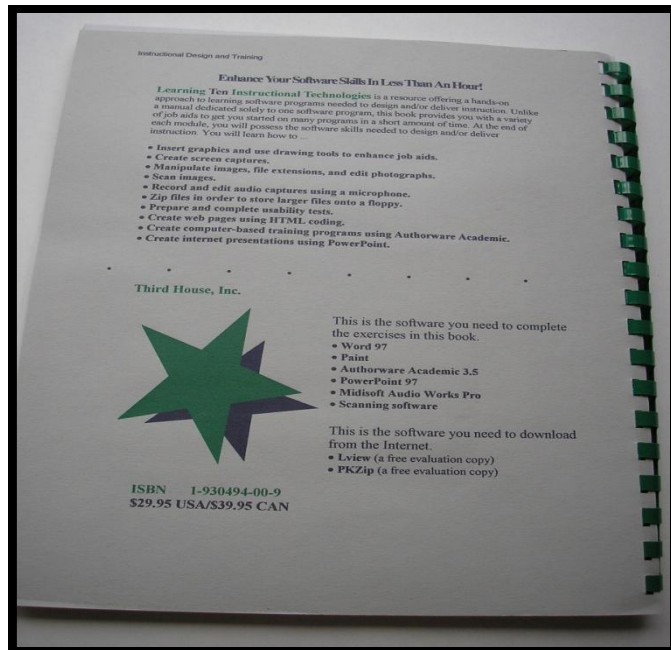
Summary

In this lesson you learned the three pre-requisite steps to complete before creating your training manual. You learned when drafting a training manual to make sure the material is:

- chunked;

- connected with transitions;

- easy to read;

- incorporates white spaces;

- uses images;

- uses bullets;

- is visually appealing; and,

- provides practices and feedback.

You learned when finalizing the training manual, you need to complete usability tests before adding the remaining front and back pages. You also learned about the elements required in the front and back of the manual. Lastly, you learned how to bind the manual.

Training Manuals used with a Live Instructor

Manuals that accompany a live training are not necessarily as detailed as self-study manuals because trainers are there to offer verbal guidance. Unlike a self-study manual that needs to communicate to trainees what equipment and materials are needed to complete the lessons, a teacher-led training manual doesn't need such information because the trainer will provide these things to the students. Likewise, communication gaps can be filled by a trainer if something is unclear in a training manual that accompanies a live training; whereas in a self-study piece, the manual has to anticipate these communication gaps and close them.

Instructional designers creating training manuals that accompany live instruction, unlike self-study, have to strategize on how to integrate the training manual materials with the live instruction. The two have to work together, not necessarily repeat or mimic each other. This guideline is also true for training manuals that are created as a compliment to some type of computer-based-training workshop, no matter if it is delivered on the Internet or CD.

Instructor Manual

If you are creating a live training, then more than likely you will also need to write an instructor's manual in addition to the students' manuals. The instructor's manual will be similar to the students' manual but it will also contain additional information.

1.   While some script may be necessary to give the instructor a feel for what you want them to say, don't expect them to communicate everything word for word. Instead they will more likely paraphrase what needs to be communicated so they sound natural while delivering the training information.

2.   Instructors typically walk around the training room, use technologies, and other visual aids as they deliver instruction. Therefore, the instructor's manual has to be mobile and easy to read with a quick glance. Large print inside the manual will help achieve this goal. You may also wish to highlight information that needs to be stressed. In some cases a text box containing questions and answers might help offset the materials.

3.   A critical feature to any instructor's manual is a timing device. There is the overall time for the training. There is the breakdown of time for each module. And there are the minutes it takes to get through each section of each module, including all presentation segments, exercises, debriefs, breaks, lunch breaks, etc.. The instructor's manual highlights these times.

4. Additionally, the instructor's manual should also indicate the following:

- o Classroom layout

- o Location of rest rooms, library, computer-labs, eating spots, etc.

- o All test and answers; exercises and supplies needed to carry out the exercise; all answer keys, etc.

- o Any helpful hints and extra tidbits the instructor might use.

- o PowerPoint overheads and/or handouts.

Practice Exercise for Step One

Write the correct answer to each question.

1. What are the four elements to a paragraph?

2. Name two transitional devices?

3. What is the table called that lists steps, actions, and examples?

4. **True** or **False**: You don't want too much white space in order that the manual doesn't become too long.

5. What technique helps the reader see important information easily?

Answers are listed at the bottom of the page.

Practice Exercise Answers for Step Three

1. Name four pages that come before the main body of the training manual?

    Title; Copyright; Table of Contents; and Preface or Things to Know

2. Besides the copyright and author or publisher information, name two additional items that might appear on the *Copyright* page.

    Rights reserved; Limits of Liability; Warranties; ISBN number

3. Name six items that might appear in the *Preface* or *Things to Know page*.

    Manual purpose; Equipment; Pre-requisite knowledge; Possible obstacles; Emphasis on following the order; Help resource person

Answers to Step One Exercise

1. A main idea; an explanation; examples; completion of an idea; and, transition.

2. Addition; Illustration; Emphasis; Examples; Suggestion; Summary

3. Action Table

4. False

5. Bullet points

Lanigan, M. (2010). *Performance technology overview (2nd ed.)*. Tinley Park, IL.: Third
   House, Inc.

Lanigan, M. (2001). *Creating evaluation instruments to predict behavior transfer:
   A new theory and measures in training evaluation*. Tinley Park, IL.: Third House,
   Inc.

Lanigan, M. (1999). *Learning ten instructional technologies: Quick and easy*.
   Tinley Park, IL: Third House, Inc.