The Influence of Transformation in Effective Training: Perspectives from Trainers in the Field

Porscha Jackson
Texas A&M University

Debbie Chang
Texas A&M University

Recommended Citation

The Influence of Transformation in Effective Training: Perspectives from Trainers in the Field

Porscha Jackson, Texas A&M University, USA
Debbie Chang, Texas A&M University, USA

Abstract: Training and development is often directly connected to human resources and less associated with adult education. However, through interviews of three trainers, it was found that through personal experiences, trainers undergo transformative learning to become trainers and such effects the way they perceive effective training.

Introduction

Training and development is often directly connected to human resources and less associated with adult education. In defining human resource development (HRD), Swanson (2001) stated "[it] is a process of developing and/or unleashing human expertise through organization development and personnel training and development for the purpose of improving performance" (p. 304); thus, indicating training and development as a major component of the responsibility of human resources for organizational effectiveness. However some trainers and scholars in HRD have recognized that effective training seeks to educate and not to simply train; therefore, there is an increasing emphasis on utilizing principles of adult education as foundational tools for facilitating trainings (Silberman, 2006). This study examines the experiences of three trainers in the automotive, international finance, and sales communication industries. The purpose of this study is to understand how work and life experiences contribute to the perceptions of effective training from three professional trainers. The study was guided by the following research questions: How do trainers learn to become trainers? How do trainers perceive effective training?

Conceptual Framework

This study is grounded in the adult learning theories of constructivist theory of learning and Mezirow's transformative learning theory (Merriam, Caffarella, & Baumgartner, 2007). The ability to create an environment that encompasses a learner's unique experiences and learning goals is important in effective training. The constructivist theory refers to how learners make meaning through prior experiences (Taylor, 2002). Additionally, it focuses on how facilitators can help adults learn and foster such learning through the structure of challenging learning activities and relevant curriculums (Taylor, 2002). The constructivist orientation recognizes that the learner's perspective and experiences are critical in his/her decision to learn and participate in learning activities (Merriam et al., 2007). Furthermore, for adults to fully engage in the learning process, they must be able to relate the subject matter to their experiences and understand its relevance to improve their current state (Silberman, 2006).

Transformative learning also provides the basis for creating a learning environment and facilitation of training sessions. Transformative learning theory operates on the importance of several experiences an individual encounters on the path to the development of a new transformative perspective of themselves and their roles based on past experiences (Mezirow, 1981). Mezirow (1981) asserts "transformation is the emancipatory process of becoming critically aware of how and why the structure

of psycho-cultural assumptions has come to constrain the way we see ourselves and our relationships, reconstituting this structure to permit a more inclusive and discriminating integration of experience and acting upon these new understandings" (p. 6). The process by which one develops a transformed perspective includes the several elements, summarized as follows: experiencing a "disorienting dilemma" (Mezirow, 1981, p. 7); self examination and critical assessment of one's role assumptions; exploration of and planning for new courses of action; building of competence and confidence in new roles; acquisition of knowledge and skills for implementation of new roles or actions; and assessment of feedback of new roles (Mezirow, 1981). Additionally, through Daloz's psychodevelopmental perspective, the role of the trainer and how they can contribute to the personal development of training participants is addressed (Merriam et al., 2007).

Methods

This study was conducted in September and October of 2011 of three professional trainers with backgrounds in the automotive industry, international finance, and sales communication. The participant from the automotive industry was a male of Caribbean decent with over 25 years of training experience and a business owner. The second participant was an Indian female with three years of experience. She became a trainer for a major financial services company in India after showing exemplary service and strong leadership ability as a member of the company's insurance team. The third participant was a Caucasian-American female with over 20 years of experience in the field. She is the president and founder of a human capital strategy firm that specializes in a range of leadership, career, strategy, and performance development services for individuals, teams, and organizations.

Data were collected through one-on-one interviews with the trainers. Participants were asked the same standard questions regarding their perceptions of effective training and effective trainers, their experiences as a trainer, and their training approaches.

Findings

Here we draw upon transformative learning to examine how trainers' experiences contribute to their approach to training, as well as how trainers determine the effectiveness of their training. We utilize the lens of transformative learning as a means of understanding how trainers' experiences inform who they are as a trainer. We present our findings in two sections. First, our participants experienced the following aspects of the transformative learning process in order to become the trainers they are today: self-examination and critical reflection, building competence and self-confidence in new roles, planning for and acquiring knowledge and skills for a new course of action, and assessing feedback. Then, we suggest that the participants, as a result of their transformative experiences to becoming trainers, determine the effectiveness of their training sessions based on whether they perceive their learners as experiencing a transformation.

On the Path to Becoming a Trainer

As previously stated, we believe our participants experienced the following aspects of the transformative learning process in order to become the trainers they are today: self-examination and critical reflection, building competence and self-confidence in new roles, planning for and acquiring knowledge and skills for a new course of action, and assessing feedback.

Self-examination and Critical Reflection

Prior working experiences led to reflections on the participants' future careers as trainers. The participants experienced a moment in their past working experiences that caused them to question their current roles within their chosen industry. For example, Dylan who started work as an apprentice stated "[I] couldn't see myself working for someone the rest of my life." Similarly, Sharon, after being hired out of college and trained to be an account manager for a major electric company, stated that insight led to a new outlook: "that one day [I knew] I was going to be a trainer and work with management [for the purposes of changing the system]." Ursa realized that once she was promoted into management, "trainees' voices were not always heard or valued by upper management. . . [I] stood in the gap between the two [management and the trainees]." This tension that Ursa experienced contributed to her challenging how she saw the role of management, and saw herself as stuck between the management and trainees.

Building Competence and Self-Confidence

The participants also found themselves building competence and self confidence needed for their paths to becoming trainers. Ursa's job was to be the liaison between employees and the organization, addressing development issues and ensuring the production of quality work. She soon became an advocate for employee voice after working on a major project "named the Gain Shared Project because no one was 100%...I was part of the project-employees were underpinning. They [leadership] said employees were not producing enough work, so they made me do training…[but while conducting training, I found that] employees became frustrated because management's goals were unrealistic." She believed that training came as "an opportunity" for trainees to share their personal stories which resulted in her becoming a voice for them.

After working for a boutique management group, Sharon took leadership over a mismanaged business, working 12 years to completely redesign the business through the development of its staff, strategic planning, and policies and procedures. This experience gave her the confidence to start and run her own business.

Planning for and Acquiring Knowledge and Skills for a New Course of Action

The participants revealed specific training skills they had acquired, which translated into their beliefs of effective training practices. As a result, the trainers' practices and strategies reveal elements of hands-on, exploratory, experimental, and application techniques derived from their personal training experience.

Hands-on. Dylan believes hands-on training is the most effective. He stated "not everything can be taught via lecture, practical experience provides knowledge on how to solve a problem. Most employees went to school and learned theories, but it is practicality that transfers." Similarly, Sharon felt the hands-on component of training was an important aspect of the training process because of her experience with training: "[It is] not lectures…it's telling them why and [letting them] see it in actions and getting them to do it and feedback- like riding a bike."

Exploratory. Dylan drew upon his learning style of accomplishing a task without specific instruction. His trainers told him "here's the problem, if you have a problem [solving the given task] then call me…after this type of experience, I was like a professional." His learning process was through

trial and error and by his second apprenticeship, he realized he was a professional based on his prior experiences and ability. Now when he trains, his goal is to provide guidance to prepare trainees to become more productive and self-sufficient. He commented on realizing that he was not aware of his actual skills until he was presented with an automotive problem and he was able to solve it "people need the opportunity to explore to learn".

Experimental. Drawing upon her most memorable training session, Sharon began to incorporate improvisation as an experimental form of training. She learned "how to utilize improv in work and life and how what you say and do affects others. [I also enjoyed] watching how players engaged with others. [I] thought about corporate [and] how to make sure output is well received by the audience."

Assessing Feedback

Participants spoke of the value of feedback as part of the learning process for them, which in turn led to their incorporation of feedback as part of their training. For example, Ursa realized the value of feedback in a train-the-trainer workshop in which she participated. She believed it was one of the best training sessions because "participants received individual feedback and were required to teach." She felt the feedback portion of the lesson was a valuable component of the session. Sharon similarly emphasized the value of feedback from her trainees as a means of determining how well she was doing as a trainer for each session.

Transformative Learning as a Way of Assessing/Determining their Training Effectiveness

Participants appeared to judge the effectiveness of their training based upon whether they felt their trainees had engaged in a form of critical reflectiveness that would result in change. Therefore, they saw themselves as the agents of that change as trainers. Sharon stated a trainer should "be a catalyst [for trainees] to think differently, we have to teach them something new, and facilitate a discussion. She added that trainers should also "help them to think of themselves differently." She attributes loving her career to being a vehicle of change that will bring out the best in individuals, groups, and organizations. Dylan acknowledged that when he trains, his goal is to provide guidance to prepare trainees to become more productive and self-sufficient. Ursa recognized the time she spent speaking with trainees prior to the training was instrumental in her ability to make the training content relevant and personable. She understood that the training had met their expectations when she witnessed them applying the training content to their daily tasks.

Discussion and Implications

In this study, the trainers learned to become trainers from prior work experiences: the desire to be independent, promotion after displaying exemplary leadership, and passion to motivate and develop others. Though they had dissimilar backgrounds and experiences, their experiences through a transformative learning process led them to the career of training and development and a common outlook on effective training. Becoming an effective trainer is a process that includes opportunity, experience, passion, knowledge, skill, energy, and relativity (Chaneski, 2009). Though the process contains the same elements, each individual experiences a different path and it is through their practical experience that trainers perceive effective training as one that is transformational. Effective trainers realize that their "job is not to train but to educate-to expose participants to new ways of thinking, feeling, and acting and allow them to integrate these ways into their being" (Silberman, 2006, p. 47).

A commonality among the trainers was that their style of training was a direct reflection of their personal transformative training experience. If they learned through experiential learning, then the learning environment they constructed resulted in one of hands-on, problem-solving and action-oriented training activities, where the trainer guided and facilitated learning. Additionally, if their training experience derived from opportunity, then a learning environment consisting of dialogue, reflection, and personal stories was constructed, with the trainer as an active participant in the learning process. The trainers unanimously agreed that in order for the training to be successful, the trainer must set the tone and have the necessary skills and personality to facilitate the session (traits learned through experience). The ability to be engaging, understanding, and flexible was a skillset that the trio possessed and agreed separated the effective trainers from the rest. Silberman (2006) confirmed that in order for adults to fully engage in the learning process, they want to be knowledgeable of the subject matter in order to relate it to their experiences and understand how its relevance will improve their current state.

The ultimate goal of training is to be effective and training cannot be effective if the trainer is not effective. The trainer is the center of training, controlling the atmosphere and facilitating learning, by serving as agents of change. In essence, the transformative learning of the trainers dictates the effectiveness of the trainer and their ability to construct a learning environment. This constructed environment considers the factors that help participants to engage in experiential and self-directed learning. The training program and how it is facilitated help in the transformational learning requiring participants to make reflections on what they are learning and involve themselves with dialogue. As stated earlier, effective training should result in a changed behavior and as such this change behavior will lead to how the trainer trains and how participants make an impact in their organizations and the community.

Though the interviewed trainers had no prior knowledge of adult learning theories, their years of experience led them to incorporate adult learning theory in their training. Merriam et al. (2007) states "the practice of adult learning has been carried out without reference to what is known about how adults learn. This position in fact characterizes much of adult learning, since only a small percentage of teachers, administrators, program developers, and others have had any formal training in adult education. From this position, those working with adult learners rely on common sense and trial-and-error learning, a less formal but certainly no less valuable source of guidance for practice" (p. 435-436). We believe this sentiment is reflected in the findings of this study. The participants did not receive formal adult learning training for their positions as trainers; they drew upon their own experiences as learners on the serendipitous road to becoming trainers. However, the transformative nature of their experiences appears to have played a role in their ideas of what it means to be a trainer as well as how one defines effective training, which arguably may be just as effective as formal training in adult learning.

References

Chaneski, W. (2009, October). The importance of skilled trainers. *Modern Machine Shop,* *82*(5), Database: Vocational and Career Collection.

Merriam, S., Caffarella, R., Baumgartner, L. (2007). *Learning in adulthood* (3rd ed.). San Francisco, CA: Jossey-Bass.

Mezirow, J. (1981). A critical theory of adult learning and education. *Adult Education, 32*(1), 3-24.

Silberman, M. (2006). *Active training: A handbook of techniques, designs, case examples, and tips* (3rd ed.). San Francisco, CA: Pfeiffer.

Swanson, R. A. (2001). Human resource development and its underlying theory. *Human Resource Development International, 4*(3), 299-312.

Taylor, E. (2002). *Teaching beliefs of graduate students in adult education: A longitudinal perspective.* M. Cervero, B. C. Courtenay, and C. H. Monaghan, Comps. The Cyril O. Houle Scholars in Adult and Continuing Education Program Global Research Perspectives: Volume 2. University of Georgia, p. 120-131.