



STRUCTURED ON-THE-JOB TRAINING SYSTEM

O-J-T TRAINER COMPONENT



PREVIEW PACKAGE

A Competency-Based Approach for Improving the Quality of On-the-Job Training

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INTRODUCTION

Thanks for considering implementing the O-J-T Trainer Component of the National Institute for Metalworking Skills (NIMS) Structured O-J-T System in your company.

We are pleased to provide this Preview Package of the Component to facilitate your decision-making. The package consists of the following elements:

- O-J-T Trainer Component Overview
- O-J-T Trainer Competencies
- Self-Directed Workbook Sample
- Performance Demonstration Report Sample
- Theory Exam Sample
- Implementation Guide
- Component Order Form

The O-J-T Trainer Component provides a systematic and rigorous framework that your company can use to achieve dramatic improvements in the quality of its O-J-T. The primary benefits that you will get by implementing the Component are:

- ✓ Credentialed, certified and competent O-J-T Trainers
- ✓ Better trained O-J-T candidates
- ✓ More effective and efficient O-J-T training process
- ✓ Enhanced employee performance
- ✓ Increased organizational productivity

We are confident that you will want to implement this Component after you have reviewed the Preview Package. To purchase the Component, complete the order form at the back of this Package and fax or mail it back to NIMS at the address on the form. Or, if you prefer, log on to NIMS website (www.nims-skills.org), go to the Products section and click on "Structured O-J-T System: O-J-T Trainer Component"

I. O-J-T TRAINER COMPONENT OVERVIEW

The **O-J-T Trainer Component** of the NIMS Structured O-J-T System has been developed through the direction and input of an Expert Panel of industry stakeholders. It has also been pilot tested with a group of metalworking companies of all sizes and types from across the nation.

Component Focus

The O-J-T Trainer Component has been designed to meet the distinct needs and requirements of the person who is directly responsible for delivering O-J-T (one-on-one or small groups) to new and incumbent employees within area of responsibility.

Component Parts

The O-J-T Trainer component is comprised of three parts:

- *Self Directed Workbook* (provides training and development material)
- *Performance Demonstration Report* (used to assess O-J-T competencies)
- *Theory Exam* (used to test O-J-T knowledge)

NIMS Certification of O-J-T Trainer

Each candidate who successfully completes this Component will receive the NIMS O-J-T Trainer Certificate. To achieve certification, your candidate follows a simple three step process:

1. Acquires the basic **training knowledge** by completing the *Self-Directed Workbook*.
2. Demonstrates the essential **training skills and abilities** required to complete the *Performance Demonstration Report*.
3. Proves **training subject matter expertise**, by taking and passing the *Theory Exam*.

After these steps are completed successfully, the candidate is awarded the NIMS Certificate. The NIMS Certificate is recognized nationally and provides evidence that the individual has the core competencies required to perform the O-J-T function in a high quality manner.

II. O-J-T TRAINER COMPETENCIES

The O-J-T Trainer Component is competency-based. This enables the O-J-T Trainer candidates to proceed at their own pace through the learning and application process. It also makes the program useful and valuable for both individuals new to O-J-T training and seasoned O-J-T trainers in your company.

The Expert Panel identified four core competency areas for the O-J-T Trainer:

- **Training Methodology**
- **Communication**
- **Coaching**
- **Adult Learner**

Training Methodology Competencies

- Implementing the four step O-J-T training process
 - Show
 - Tell
 - Do
 - Check
- Reporting on training outcomes

Communication Competencies

- Utilizing active listening skills
 - Sending and receiving message
 - Giving clear directions and instructions
 - Checking for understanding
 - Acknowledging understanding
 - Giving and receiving feedback
- Overcoming communication barriers

Coaching Competencies

- Instilling and reinforcing positive behavior
- Establishing environment conducive to learning
- Representing company policies and procedures (including safety)
- Taking ownership for trainee progress
- Maintaining focus on desired learning outcomes

Adult Learner Competencies

- Treating trainees like adults
- Applying adult learning principles
- Adhering to adult learning guidelines

III. SELF-DIRECTED WORKBOOK SAMPLE

The Self-Directed Workbook is the centerpiece of the O-J-T Trainer Component. The Workbook is unique. It is designed so that your candidates can use it independently to gain the knowledge to be an O-J-T Trainer.

Competency Modules

The heart of the Workbook is its four competency modules:

- **Training Methodology**
- **Communication**
- **Coaching**
- **Adult Learner**

Module Structure

Each module includes the following:

- **Learning Objectives** – describe what a candidate will be able to do upon successful completing the module
- **Assessment Activity** – allows candidate to assess initial knowledge and perspective before beginning the module
- **Content Pages** – present the training information for the module
- **Learning Activities** - enable the candidate to interact with and apply the module's content to “learn by doing”
- **Review Activity** – allows the candidate to reflect upon what has been learned and the insights gained by completing the module
- **Review Questions and Answers** – test the candidate's understanding of selected module content
- **Application/Implementation Aids** – provide tools that the candidate can use to apply and implement the module content

The **Table of Contents** from the Workbook and sample pages from **Module 1: Training Methodology** follow.

O-J-T TRAINER SELF-DIRECTED WORKBOOK

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MODULE 1: TRAINING METHODOLOGY

“Practice does not make perfect. Perfect practice makes perfect.”
- Vince Lombardi



OVERVIEW

This module provides an introduction to a basic methodology for doing on-the-job training. It sets out the methodology and explains how to implement it to ensure that your on-the-job training is delivered effectively and efficiently.

LEARNING OBJECTIVES

As a result of completing this module, you will be able to:

- List and define the four steps in the O-J-T training cycle
- Describe key considerations and issues to be addressed in implementing the cycle
- Develop a plan for implementing O-J-T in your area of responsibility

SAMPLE

ACTIVITY 1.1. TRAINING METHODOLOGY ASSESSMENT

Before you begin this module, consider your company's current approach to O-J-T in your area of responsibility and your knowledge and experience as an O-J-T Trainer.

- How would you describe your company's current training approach?

- What are the strengths of that approach? What could be improved?

- How did you receive your O-J-T training? What was good about that process? What could have been improved?

- How would you describe your O-J-T knowledge and experience?

- Given this assessment, what level of importance would you assign to this training?

- What learning priorities would you set for yourself for this module?

STRUCTURED O-J-T

On-the-Job Training (O-J-T) is done in organizations of all types every day. O-J-T can be either informal and unsystematic or structured.

Research has shown that Structured O-J-T that focuses on desired outcomes and competencies is a much more effective and efficient way of developing employee skills than haphazard and random orientation. It enables employees to progress methodically through a set of sequenced steps or behaviors that they repeat until they have accomplished the task or job to prove their competency.

SHOW-TELL-DO-CHECK TRAINING CYCLE

- **Show:** demonstrate to trainees what they should do
- **Tell:** explain what trainees should do and why they should do it
- **Do:** Have trainees perform the task/work/job
- **Check:** Evaluate the performance and inspect the results

The first formal approach for Structured O-J-T was developed by Charles Allen - a Massachusetts vocational instructor - to train shipbuilders during World War I. That process is a four step cycle: Show-Tell-Do-Check.

- Show: You demonstrate
- Tell: You describe or explain what you demonstrated
- Do : You have the trainee do the task or job
- Check: You evaluate the performance and inspect the results. Then, you acknowledge what has been done correctly and provide specific feedback on what needs to be improved.

Notes

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ACTIVITY 1.2. PURCHASING GAS AT A SERVICE STATION O-J-T

Let's apply these four steps to a simple set of tasks like training someone to purchase gas at a self service station.

- **Purchasing Gas: Show Step**
- **Purchasing Gas: Tell Step**
- **Purchasing Gas: Do Step**
- **Purchasing Gas: Check Step**

Use the space below to list what you would do and what key points you would make in implementing each step. Then compare your lists of key actions and points to those on the pages which follow.

Purchasing Gas –Key Actions/Points

Show Step – Actions/Points

Tell Step – Actions/Points

Do Step – Actions/Points

Check Step – Actions/Points

Activity 1.2. Purchasing Gas Example: Show Step

- **Show:** Demonstrate how to purchase gas:
 - Insert credit Card as specified
 - Withdraw Card
 - Select grade of fuel
 - Lift up handle on fuel pump
 - Unscrew cap on gas tank
 - Remove hose from the holder on the fuel pump
 - Insert nozzle of hose into the gas tank
 - Push trigger on handle to start fuel flowing
 - Pump desired amount of gas
 - Stop pumping when desired amount of gas has been put into the tank
 - Remove nozzle from gas tank
 - Return hose to holder on fuel pump
 - Replace and tighten cap on gas tank

Now let's review each step beginning with the Show step. Compare your show steps to the steps listed above.

Comparison Questions

- How many of the steps on the slide did you have listed? What steps didn't you list?

- Did you have steps not listed?

- If so, how important are they? Would they improve the demonstration?

Activity 1.2. Purchasing Gas Example: Tell Step

- **Tell:** Describe the steps that you took to purchase the gas. Emphasize important safety and procedural points:
 - Don't smoke in the fueling area
 - Be sure to withdraw credit Card and put it away
 - Be Careful in unscrewing cap
 - Pay attention while fueling to ensure that you don't get more than the desired amount of gas
 - Don't top off the tank
 - Be sure to remove the nozzle before driving away from the pump
 - Be Careful in removing nozzle so that you don't splash gas on the side of the PDR
 - Be sure to tighten the gas cap

Now, let's go to the tell step. First thing you'd do in the tell step would be to describe the steps that you have listed on the show step in order to reinforce the learning.

However, that's not all you do in the "Tell Step". As the list above shows, an important part of this step – especially for a task or job that is done in potentially hazardous conditions – is to emphasize important safety and procedural points as part of the telling. Compare your tell list to the steps/points on the list.

Comparison Questions

- How many of the steps/points on the slide did you have listed? What steps/points didn't you list?
- Did you have steps not listed?
- If so, how important are they? Would they improve the instruction?
- Did you include key safety and procedural points as part of your instruction?

Activity 1.2. Purchasing Gas Example: Do Step

- **Do:** Have the trainee perform the tasks. Ask the trainee to:
 - List all of the steps required before beginning the process
 - Identify the most important safety or procedural points
 - Summarize what has been learned
 - Repeat the tasks if there is difficulty in task performance

Now compare your Do step list.

As the list above illustrates, it's not good enough to have the trainee do the task. The trainee should also talk through the process and focus on safety issues as part of their practice performance. And, most important, if the trainee has problems with performance, she or he should repeat the job till it's done right.

Comparison Questions

- How many of the steps/points on the slide did you have listed? What didn't you list?

- Did you have steps not listed?

- If so, how important are they? Would they improve the practice performance?

- Did your steps include having the trainee talk through the process and address safety issues as part of their performance?

Activity 1.2. Purchasing Gas Example: Check Step

- **Check:** Observe and evaluate the trainee's performance:
 - Monitor the trainee during the process to ensure that the proper sequence of steps is being followed
 - Ask questions, if required, to clarify the trainee's understanding
 - Assess performance at the end to determine whether all procedures, especially those related to safety were adhered to and the proper amount of gas was purchased
 - Give feedback to the trainee on the performance highlighting what was done correctly and incorrectly in the purchasing process
 - Provide recommendations to improve future performance

Finally, review your Check Step List. How does it compare to the list above? Did you include asking questions of the trainee as part of your review process? Did you include giving feedback and providing improvement recommendations?

An important point to remember here is that checking is not just evaluating or inspecting, it's also establishing the basis for continued and ongoing proper performance of the job or task.

Comparison Questions

- How many of the steps/points on the slide did you have listed? What didn't you list?
- Did you have steps not listed?
- If so, how important are they? Would they improve the assessment process?
- Did your steps include feedback and improvement recommendations?

The checklist on the next page provides an aid that you can use to implement the Show-Tell-Do Check Cycle effectively in your O-J-T training.

SHOW-TELL-DO-CHECK TRAINING CYCLE CHECKLIST

To start the cycle

- Put the trainee at ease
- State the job
- Find out what the trainee already knows about the task
- Make sure that the trainee can see the operations

Show Step

- Demonstrate the procedure step by step
- Perform each step completely and accurately
- Perform the task at a normal pace
- Adhere to all safety requirements
- Ask for questions

Tell Step

- Describe the proper way to do the task
- Instruct clearly, completely and patiently
- Stress key points
- Explain the more complex or difficult job aspects
- Ask for questions
- Emphasize safety requirements

Do Step

- Have the trainee do the task
- Ask the trainee to explain key points or steps
- Ask questions to check for understanding
- Interrupt the trainee if there is a safety violation
- Have the trainee practice until the task is done to standard

Check Step

- Evaluate performance
- Inspect results
- Give specific feedback
- Praise successes
- Correct in a friendly and calm manner
- Provide improvement recommendations
- Ask for questions
- Provide positive encouragement

ACTIVITY 1.3. SHOW-TELL-DO-CHECK PRACTICE EXAMPLE

Before proceeding think of training one of your employees on one simple task such as tying a tie, making a paper air plane, or changing oil in a PDR. Or, if you prefer, pick a simple job task that you will have to train your O-J-T trainee on.

List that task here including all of the key steps that must be taken to perform that task effectively.

- Task: _____
- Key Steps:

Then, use the space below to make notes on what you would do to train the employee using the Show-Tell-Do-Check approach.

Training Notes

Show Step - Actions/Points

Tell Step - Actions/Points

Do Step – Actions/Points

Check Step – Actions/Points

IV. PERFORMANCE DEMONSTRATION REPORT SAMPLE

The Performance Demonstration Report (PDR) is the official report for documenting successful performance in meeting the NIMS skill requirements for the O-J-T Trainer credential. The PDR defines the work history and experiences requirements for the O-J-T Trainer position. It also requires three Skill Checks of the candidate doing O-J-T training by a performance evaluator.

A sample of the format from the PDR used by the evaluator to conduct those skill checks follows. The PDR is self-explanatory and contains complete directions for its use. You can receive a full PDR for review by contacting NIMS.

SAMPLE

O-J-T TRAINER PDR SKILL CHECK SAMPLE

JOB INFORMATION

Candidate Name: _____

Nature of O-J-T Project:

Number of Trainees: _____

Competency Area	Process-Performance Standards	YES	NO
1. O-J-T Training Plan	<ul style="list-style-type: none"> <input type="checkbox"/> Reviewed O-J-T training plan, checklist or company tool <input type="checkbox"/> Modified plan as required 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
2. O-J-T Training Plan Implementation	<p>In implementing the training plan, to complete the three Skill Checks, the candidate:</p> <p style="text-align: center;"><u>Skill Check #1</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Prepared to conduct training (e.g., dry run, walk through) <input type="checkbox"/> Assembled all necessary equipment and equipment for training <input type="checkbox"/> Determined trainee's prior experience <input type="checkbox"/> Showed the trainee how to do the job – demonstrated proper procedures and behaviors <input type="checkbox"/> Told the trainee how to do the job – explained the more complex or difficult aspects of job and emphasized correct methods including safety <input type="checkbox"/> (Do) Had the trainee perform the job (either simple parts first or whole job -depending on job difficulty) – asked questions to confirm knowledge and understanding during skill application tasks and had trainee repeat task, as required 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

SAMPLE

	<u>YES</u>	<u>NO</u>
<ul style="list-style-type: none"> <input type="checkbox"/> Checked the trainee's performance of tasks – evaluated the performance of the trainee and inspected the results <input type="checkbox"/> Acknowledged what was done correctly and gave feedback on what needed to be improved <input type="checkbox"/> Completed trainee checklist/company training report and had trainee sign 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<u>Skill Check #2</u>		
<ul style="list-style-type: none"> <input type="checkbox"/> Prepared to conduct training (e.g., dry run, walk through) <input type="checkbox"/> Assembled all necessary equipment and equipment for training <input type="checkbox"/> Determined trainee's prior experience <input type="checkbox"/> Showed the trainee how to do the job – demonstrated proper procedures and behaviors <input type="checkbox"/> Told the trainee how to do the job – explained the more complex or difficult aspects of job and emphasized correct methods including safety <input type="checkbox"/> (Do) Had the trainee perform the job (either simple parts first or whole job -depending on job difficulty) – asked questions to confirm knowledge and understanding during skill application tasks and had trainee repeat task, as required <input type="checkbox"/> Checked the trainee's performance of tasks – evaluated the performance of the trainee and inspected the results <input type="checkbox"/> Acknowledged what was done correctly and gave feedback on what needed to be improved <input type="checkbox"/> Completed trainee checklist/company training report and had trainee sign 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<u>Skill Check #3</u>		
<ul style="list-style-type: none"> <input type="checkbox"/> Prepared to conduct training (e.g., dry run, walk through) <input type="checkbox"/> Assembled all necessary equipment and equipment for training <input type="checkbox"/> Determined trainee's prior experience <input type="checkbox"/> Showed the trainee how to do the job – demonstrated proper procedures and behaviors <input type="checkbox"/> Told the trainee how to do the job – explained the more complex or difficult aspects of job and emphasized correct methods including safety <input type="checkbox"/> (Do) Had the trainee perform the job (either simple parts first or whole job -depending on job difficulty) – asked questions to confirm knowledge and understanding during skill application tasks and had trainee repeat task, as required <input type="checkbox"/> Checked the trainee's performance of tasks – evaluated the performance of the trainee and inspected the results <input type="checkbox"/> Acknowledged what was done correctly and gave feedback on what needed to be improved <input type="checkbox"/> Completed trainee checklist/company training report and had trainee sign 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

V. THEORY EXAM SAMPLE

The theory exam is administered according to NIMS standard testing procedures. The procedures for registration and test administration are posted on NIMS website. The theory exam is open book and the candidate has 90 minutes to complete it.

Because of its use for testing and assessment purposes, the theory exam is not included with the O-J-T Trainer Component material. However, the questions on the exam are similar to the Review Questions at the end of each module in the O-J-T Trainer Self-Directed Workbook. Sample questions from the end of the Training Methodology module included in this Preview Package are presented below.

Training Methodology Module Sample Review Questions

1. The structured approach to OJT developed by Charles Allen to train shipbuilders during World War I is:
 - a. The Show-Tell-Do-Check cycle
 - b. The Show-Tell-Do-Repeat cycle
 - c. The Tell-Show-Do-Check cycle
 - d. The Tell-Show-Do-Repeat cycle
2. In demonstrating or showing the trainee how to do the job, the OJT trainer should:
 - a. Hold all questions until the end
 - b. Not provide explanations as the demonstration is in process
 - c. "Talk through" the job and emphasize key points
 - d. Allow a limited amount of interaction between the trainer and trainee
3. In evaluating the trainee's performance, the OJT trainer should:
 - a. Provide feedback only on what the trainee did wrong
 - b. Highlight one strength and one weakness
 - c. Acknowledge what was done correctly and identify what needs to be improved
 - d. Be low key and not too critical

SAMPLE

VI. IMPLEMENTATION GUIDE

NIMS has prepared an Implementation Guide for the O-J-T Trainer Component. The Guide is thoroughly documented and detailed and makes implementation of the Component a fail proof and painless process.

The Implementation Guide sets out the steps and provides all of the basic tools that you will need to administer the implementation of the Component within your company. It was developed based upon the direction of the industry Expert Panel that oversaw the creation of the Component and the experience of the companies that pilot tested it.

The Table of Contents for the Guide follows.

SAMPLE

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CONCLUSION

Thanks again for considering implementing the NIMS O-J-T Trainer Component and reviewing this Preview Package.

We trust that you will see the value of the Component for your company. We look forward to being your resource for improving the quality and the results of your on-the-job training.

SAMPLE