

How to Coach/Cross-Train

Serving as a “trainer” is an exciting, maybe humbling experience. You have the experience to share and you know you can help your new colleague get a great start.

So take some time up front to plan – what are the key points, the “how to,” plus your lessons learned? Now, how do you package it so your new hire can absorb?

- Who are you trying to Help?**
- If they are **brand new** to the task or this type of work in general:
- Provide the background and explain any lingo (watch for that puzzled look)
 - Be patient - chances are that participants will need to hear and apply the basic concepts several times in order to retain the information.
 - They may be somewhat overwhelmed and may not remember the more advanced topics.
- If they have **some experience** with the task:
- It always helps to refer to participants’ experience and check their expectations of the session before you get started.
- If they have performed **this role** at another organization:
- Ask more detailed questions so you can compare and contrast
 - Don’t forget to review all steps start-finish to make sure you have not missed any nuanced differences.
- Goal**
- Set specific goals - What do you want your new colleague to learn or do at the end of the session?
 - Short “bite size” sessions are usually more effective
 - Be realistic – at the end of the session, compare what you accomplished versus what you planned – don’t be surprised if you didn’t get as far as you planned!
 - Pace yourself – how long did it take you to learn this topic? You probably learned over time, so think how you can replicate that experience for your new colleague
 - Tell them up front what they will be learning and how it relates to their job.
 - Examples of session goals:
 - Understand how your organization calendar works and how to enter or revise what the computer system can do.
 - Review organization mission and together create a 30-second story to explain to any who asks about your new job
 - Answer the top five most frequently asked questions
- Content**
- How will you accomplish these goals? What are the key messages? How do these messages relate to your new colleague?
- Some points to consider:
- Adults learn best when they understand the structure and how the content relates to them.
 - Outline a structure which will help your new hire intuitively understand the concept or process you want to convey
 - Using transitions (the second of five steps, etc.) helps them follow along
- You may have a manual and tons of notes to share, but watch that you don’t overwhelm your new colleague
- An outline of the main points will be a great roadmap to guide your discussion

- Reinforcement** What is the best way to reinforce this information? Studies have shown that new hires learn by doing, not just listening.
- Make your conversation interactive will help them retain and use the information more quickly.
 - Possibilities include reviewing a case, completing an exercise, or “quizzing” them by asking review or application questions.
 - Follow up – review what you covered last time, and debrief