

Setting the Stage for Effective Training (Steps 1-3)

Having outlined the “Nine Steps to Effective Training,” let’s look at them in more depth using the request for a ‘needs assessment’ listed in “The Call.” The first three steps set the stage for both the preceptor and the student surveyors.

Step 1: Gain the learners’ attention.

It is vital to set a positive and friendly tone that recognizes the experience of the surveyors while establishing the preceptor’s credibility. This can be done by using an ice-breaker that is off-topic, a getting-to-know-each-other exercise, or a question that relates to the training at hand, but poses a possible problem or asks an absurd question.

Example: “How many of you just LOVE to fill out Form CMS-2567?” Or on a more serious note, it might be, “How many of you feel clear and competent about the documentation requirements in filling out a Form CMS-2567?”

Be sure to have a follow-up answer in the event there is strong agreement or disagreement. This should be one in which you can easily proceed to Step 2.

Step 2: Review learning objectives.

The point here is to avoid rote recitation of the objectives that the surveyors can read for themselves.

Such responses as, “NO? You don’t love filling out Form CMS-2567s? I’m shocked! Then let’s see if the objectives for this training might make this a less challenging task. Our objectives for today say that by the end of this training you will”

Or if the indication that they are comfortable with the task (in spite of the obvious need for additional training), the response might be, “Well, that’s good you feel you’re on solid ground, so let’s step it up a notch to some more challenging situations so that by the end of training you will....”

Step 3: Provide a link to previous knowledge or experience and its importance to their learning.

“In earlier training we saw a PowerPoint presentation on the Principles of Documentation (POD) related to documentation of findings. Let’s review those summary slides to refresh our memories and afterwards we’ll talk about any questions or concerns that you might have.”

The link may be related to previous training or a common experience the surveyors may have had as participants in a survey.