Developing LSP / Technology Training

Developing technology training for library staff has three overall phases:

1. Break the topic, platform, or functional area down into teachable chunks (Structure)
2. Develop the training for each chunk (Model, Tools, Content)
3. Provide the training

This document offers tips and best practices for each of these three phases, as well as specific suggestions for training on Alma or Primo VE.

Develop a Structure/Curriculum

Technology training is usually a response to acquiring a new platform or tool, so the overall topic isn't a choice. However, for any training program, you do need to decide how to break down the learning process into manageable, relevant pieces.

For a new Library Services Platform (LSP) like Alma, this is a common structure and the considerations or questions to ask for each area:

Introduction to the System

- For everyone
- Demystify the system
- Show the basic functions/workflows –simple examples to get a feel for how it works
- Balance theory and function, if it's a new architecture

Cross-Functional Needs

- Features and concepts that touch/are part of multiple functional areas
    - In Alma, search, sets, jobs, items, holdings, work orders, etc.
- "Aware of" – staff need to have a more general understanding of a unified platform than previous module-based systems, so they know how their work will have an impact on work further down the workflow or was affected by earlier work
    - E.g., If staff in Technical Services don't mark an item's Technical/Acquisitions work order as Done, circulation/stacks staff won't be able to scan it at their library to be shelved

Functional Area Training

- Open to everyone, prioritize staff for whom this is their primary work

- If all your staff "need everything," this is simplified – they just go through together as a cohort and learn it all
- Choose a sequence based on local workflows and/or the lifecycle of the process, such as:
  - **Circulation** => start with a typical circulation interaction and move on from there
  - **Acquisitions** => search, order, catalog, receive, catalog some more, invoice, shelve/physical prep
  - **eResources** lifecycle
  - **Serials** renewals

Completely New Features/Functions

- How/when do you introduce them?
- Do they replace/upgrade existing functions?
- Do they replace hacks/workarounds? (e.g., pseudopatrons → work orders)
  - How do you make sure everyone does the new thing? (like forcibly delete new pseudopatrons)
- Do they increase efficiency after the learning curve? How do you demonstrate that?
- Do they stand alone or are (somewhat) optional? Or are they integrated into other processes, and you need to use them to really get the benefits (like templates in orders and cataloging)?

Updates/New Features in Monthly Releases

- How/do you train on what comes out in monthly releases?
- What metrics do you use to choose what to train on and what to simply inform staff about?

Systems Librarians

- How do you train new/promoted systems librarians who aren't part of the direct migration?
- They need to know everything that end user staff do, plus all of the configuration and troubleshooting knowledge.

Following this outline, it may be helpful to create curriculum maps for training within each area. A **curriculum map** is a literal map to what's in each training session and how you're going to move from one topic to the next in a meaningful sequence.

As a quick example, let's look at Acquisitions in Alma, based on the Ex Lbris model as used by Harvard University. Each of these is a class, usually 2 hours of hands-on training except for Vendors, Invoices, and Funds:

1. Searching Vendors, Invoices, and Funds (1 hour)
2. One-Time Orders 1: Order creation
3. One-Time Orders 2: Receipt and invoicing

4. Continuous Orders 1: Order creation
5. Continuous Orders 2: Receipt, Invoicing and Item creation
6. Order Maintenance

The class outline for both the One-Time and Continuous Orders classes is the same, but the content focuses on the needs for those distinct types of orders (a critical distinction at Harvard). Here's the *One-Time Orders 1: Order Creation* outline:

- Overview of Alma Acquisitions Workflow
- POL, PO and PO Line Owner concepts
- Walk through a straightforward OT order, using existing bib in Alma
- Using the Search External Resources option
  - Importing a bib from an external source and Stub bib creation for reference
- Placing one-time orders for physical items, including working with Vendors and Funds
- Submitting the order
- Seeing what the completed order looks like
- Finding out what goes into review and why
- Using One-Time Order Templates

Approach each functional area the same way: divide it into classes or courses (whether longer single classes or shorter classes in a course work better for your staff), then break down each class/course topic further. We'll look more closely at developing the actual classes later in this document.

Model & Tools

Once you've broken up your content into a curriculum and chosen the overall structure of what you need to train on, it's time to look at how you're going to do that. First, develop a model (which you'll refine as you actually pull together the material), then choose what tools you'll use to deliver the training.

Model – Questions to Ask

- Do you use the same training for the migration/implementation period as the long-term needs?
- Model
  - High-touch/high customization & individualization
  - Low-touch/little customization or individualization (lots of vendor-provided & existing training)
  - Somewhere in the middle, choosing elements of both

- Who gets trained, where & how (format, location, production/Sandbox, etc.), when (timeline)
- Why – how do you sustain engagement for folks who need a lot of training or create it for folks who need very little?

Tools – Questions to Ask

1. **Online or in-person?** Offering hands-on training to staff new to the system or a functional area is best, and follow-up training can be online.
2. **How long?** In-person training can be as short as an hour or as long as a full-day in-service, but be mindful of how much new learning you ask people to do at once. Staff need time to practice and assimilate their knowledge to really understand Alma, and they need time to re-train their muscle memory to new keystrokes and click paths. Build that time into your structure.
3. **How interactive will it be?** Make sure to suit the style to the material, and not the other way around (whenever possible) and be creative! Again, Alma training works best with hands-on practice and planned exercises, but there are some areas that benefit from more thinking/round table style interactivity:
    - Brainstorming scope for sets, jobs, or templates
    - Brainstorming workflow changes after staff have basic familiarity with the platform
4. **Live site or slides?** Obviously, you'll mostly want to work live in Alma, but you may want to have slides or screenshots as a backup in case Alma is down or really slow that day.
5. **Handouts?** 90% of people never go back and look at handouts after the training, and Alma is still under active development and constantly changing. Staff will ask for printed handouts and step-by-step screenshots; but these will be outdated quickly and waste paper. Encourage staff to use online documentation that can be maintained; give them a URL to a website or blog page and live link from there.
6. **Activities?** What kinds of and how many, exercises or examples will you use? Cumulative – building on a single project over the entire training – or individual exercises that don't relate to each other? Will folks work together or individually? Are the exercises academic or will participants end up with a usable product at the end? How will you deal with people who "don't have any ideas, they're just there to learn"? See the "Choosing Examples" section later in this document for specifics.
7. **References and resources.** Keep track of everything you read, watch, or skim while creating your workshop. You might not make a note at the time but want to reference something later, and you *know* you'll never find it again when you need to. Especially keep track of Ex Libris or institution training or documentation you reference often and provide that with your online documentation.

8. **Pacing and limits.** How much is too much? Humans can only use their brains in full-on mode for so long – how often are you scheduling breaks, either actual physical intermissions or just a break from a higher-density topic to a lower-density one?
    a. **Rules of thumb:**
        i. Up to 1 hour = no break
        ii. 1 hour – 2 hours = 5 or 10-minute break
        iii. 2 hours – 3 hours = one 15-minute break or 2x10-minute breaks
        iv. 3 hours – 4 hours = 2 x 15-minute breaks
        v. 4 hours – 5 hours = a full 45 minutes or more for lunch, plus two 5- to 10-minute breaks
        vi. 5 hours – 8 hours = a full hour for lunch, plus two 15-minute breaks
9. **Fun!** How can you incorporate some elements of fun into your training, especially a longer session or multi-week program? You don't need to be a stand-up comic or a storyteller, but whimsical slides, a running visual joke, or musical interludes can do wonders to break the intensity for a few moments and give participants a chance to reset and learn more effectively.

Developing the Training

Once you have an idea of what you need, get started building!

"Teach the Tool"

Whenever relevant and possible, distinguish between how Alma works and policy/procedure/workflow/local practices. Alma frequently has multiple ways to get somewhere or to do something. Teach all of them, and say, "Choosing which is preferred practice is outside the scope of this training. Talk to [relevant working group or staff] for more information. Alma can do both of them and they both work, it's up to you to choose.

Hopefully, these decisions are made before you train, so you can show a preferred practice whenever it exists. It's still a good idea to show the non-preferred method in case someone does it that way by accident. Also, sometimes it's up to individual campuses, libraries, or departments to choose their own workflows. Stress that there isn't a single right way, they should try all of them and see what fits their situation best.

User roles & permissions

Know (to the best of your ability) what roles/permissions are needed for what you're going to train on, especially for hands-on training or small working sessions. State these in the original announcement and every single reminder that goes out; even with that, you'll have folks who don't have the right permissions and will have to follow along without doing the work. Remind them that Alma is permissions-based, that you can't see/do things you don't have the permissions for, and that they should ask for whatever permissions they need to do their work.

Class Structure

Follow a narrative. Most people learn better when there's a "story" they can follow and link the steps to. Use this narrative to determine the flow of topics in each session. For example, in a Circulation class, the narrative may be:

1. A patron shows up with a card and a stack of materials
2. Look up their account
3. Loan out those materials
4. "Oh by the way, I want to renew this book…"
5. "Can you tell me what fines I have?"
6. "Oh wow, I lost that. Now what?"
7. And so on…

This is why **tangents** and jumping around can negatively affect learning efficacy. Drift too far from the narrative and people lose where they were in the story, sometimes it can be really challenging to get it back (for them and you). We'll look more at handling tangents in Providing the Training.

This is also true for **the lifecycle of related actions**, such as the ordering/receiving/invoicing/processing sequence in technical services. In Alma particularly, it's critical to know how actions at one step in the process have an impact elsewhere, even (and possibly even more so) if your institution is large enough that different people handle each step separately. Someone who only processes invoices needs to know how orders happen, so that they understand how the invoice is assembled, and why it works a certain way. For serials, the ability to receive new issues is affected by how the title is ordered, so that has to be done correctly every time. Encourage staff to participate in as much training as they can, so they understand this context, even if it's not "just how to do my job."

Work in chunks. Try to schedule breaks at natural stopping points in the narrative using the guidelines from earlier. Don't force the issue – find a decent stopping point and have a short break if the alternative is three straight hours of training. Listening to talking heads for too long leads to sleeping learners; and too much exercise time leads to people going off and doing their own thing, losing track of the narrative you've worked so hard on.

Show don't tell, but a highlights reel can help give context. Don't tell people how to step through a sequence, actually step them through it, but it can be helpful to describe the sequence briefly first: *"In this next process, you choose the type of order you want first, and then that changes the options available on the next screens. For instance, physical one-time orders have this this and this, while physical continuous orders have this, but this other thing, then this."* Then go on to demonstrate each. You've given them the outline of the story that they can link each section to.

Choosing Material to Use

It's not plagiarism if it's your own work. Re-use whatever content you can from previous trainings on the same topic, or on related topics. Build your own warehouse of favorite slide images or library of activities and brainstorming questions. Save yourself time and create modules of content you can mix & match, don't reinvent the wheel.

That said, stay open to the fact that it may be faster to recreate than update something that's incredibly outdated or ill-fitting to the current topic. Grab a couple of key phrases or good images and move on.

Research, read, watch, and prepare much more than you'll actually present on. You may need to answer a question about why you're not covering an advanced topic in this intermediate class, or be able to do the 30 seconds of troubleshooting that contribute to everyone's understanding. The more you have in your head, the more examples or refinements you'll be able to draw on during the session.

Choosing Examples/Exercises

- Chose typical/common searches and functions to demonstrate a process. Go through the whole thing as a demo, then go through it again with folks following along. If it's a really straightforward sequence, you can skip the demo.
- Go through the basics at least twice, then start getting on to the weird stuff. For these, also start with the most common of them and then move on to the real edge cases.
- Someone will say, "My work is nothing but edge cases!" That may be true, but they still need to learn the way the tool works, and the best way to do that is through straightforward examples and then learning how to apply that tool to other cases. The system works the way it does, and if you understand the basics, you can adapt it to whatever situation you have.

- If there are three ways to do anything, and how you do it depends on your role (e.g., creating items in Acq/Tech Svcs or creating on-the-fly items during Circulation), poll the room and see what percentages there are for the different roles. Weight how much time you spend on each variation accordingly.
- Remember that you're training on a live site or in a shared sandbox. If you want everyone to have individual examples to work on, make sure they're unique. You can either prep them ahead of time (fake orders to receive or invoice, fake holdings to update, fake users to manage, etc.) or you can create searches that will allow people to find their own records. Note that the second option means that the records will nearly always be unique, and relevant; this matters more when you're training across different libraries or institutions (in a consortium) and what's in one person's collection may or may not be in another's and they only have access to their own.
- If you do create fake records, confirm that all of them are reset afterwards if you're teaching another session. Otherwise, you lose class time (in either session) having them reset everything.

Evaluations

As you're developing your training, create a single simple evaluation form that you can use for all of your classes or sessions. A few well-chosen questions can give you the feedback you need to refine the training and choose what else you need to offer training on. As ever, choose the method for your evaluation by knowing your staff: if they prefer paper, do that, or provide a link to an online form. Just asking for feedback isn't enough; give them a couple of standard questions and then an open area for comments.

Providing the Training

Once the training itself is developed, all that's left is to do it! There are entire articles and books on classroom management, effective public speaking, and building learning communities, but here are basic tips and tricks for whomever is providing the training you've developed.

Practice, or at least review/talk through your outline and exercises a number of times before your session. Have the sequence of events memorized, even if you don't memorize everything you're going to say. This helps with in-the-moment changes or adapting to things out of left field.

Try all your exercises the day before/morning of, especially for tech training, in case an update changed something dramatically overnight. Have a plan for No Internet, Platform Downtime, etc.

Nerves happen, even to experienced trainers and presenters. Breathe slowly and intentionally, go for a short walk, play your motivational music (Do you have a theme song? Get a theme song!), whatever you need to. Try not to putter with materials – that just makes you and your participants nervous.

Your Style:

- **Use humor**, it makes you more engaging and approachable. Dry or saucy, try it out.
- **Some folks prefer memorization, some improvization. Do whatever works for you, but have some skill with the other side.** If you prefer improv, memorize a few key points with just the right phrasing to make sure those are perfect. If you prefer memorization, build in a few places where you can riff on the topic for a moment or two, to surprise and rejuvenate your audience. (Yes, plan your improv. Professional comedians do it, why not you?)
- **Be Humble and Honest, but not self-deprecating.** Don't downplay your own skills or experience. If you don't know or aren't sure, say so, but with confidence:
  - "You know what? I don't know. Let's look that up together."
  - "I'm not sure, but I think it's [this]. Let's confirm that."
  - Sometimes, the answer is: "That's a policy/procedure question, and that's outside the scope of this class."

Handling Questions:

- **State at the beginning whether you'll take questions as you go or at the end.** Either way, check in with the participants to make sure everyone is following along. "Does everyone know what X is?" "Do you understand what I mean when I say Y?"
  - **Guidelines:**
    - Under 30 minutes = take questions at the end

    - 30 minutes – 1 hour = Either during or after is fine
    - More than 1 hour = Take a break at each subtopic for questions, and again at the end for the whole thing

- **There is no such thing as a dumb/stupid/obvious question.** Establish this at the beginning by saying “All questions help everyone learn,” “This is a no judgment zone,” or “We are all learners here.” Reinforce it any time someone prefaces their question with “This is obvious, but…” or other phrases.

- **There will always be The Questioner, who asks questions for the sake of asking them.** As long as their questions are generally contributing to everyone’s learning, answer them but maintain control of the interaction. “That’s a great question, I’m about to get to that, thanks!” If their questions are specific to their own experience or are their way of stating an agenda, shut it down and suggest they stay after class to discuss it further (they probably won’t).

Introductions. For smaller groups, do a round of introductions. Sometimes, this is than opportunity for staff to match faces to names. Also, it gives you the opportunity to also ask why people are there/what they hope to get out of the training, or what background they have. That can inform or even redirect your training. For large groups, consider asking 5 people the “why are you here today?” question, or ask for a show of hands to the stated goals/learning objectives and then ask if there’s anything else?

- “Are you here to learn about X?”

- “Are you here to develop your skills in Y?”

Tangents. Follow them as long as they contribute to everyone’s learning. Rabbit holes can be fun, but they’re also small and not everyone can follow along. Agree to be available during breaks/after the session, or to provide another training on that topic. If there’s significant need, suggest folks get together in a learning circle to work through the tangent topic in multiple sessions.

Pacing

- **Questions –** Reiterating the section above, questions are good, but too many questions can wreck your carefully thought-out learning plan. Use classroom management to keep things on track, or (rarely, and with great consideration) throw out the map and follow the discussion. This can be successful, but only in the perfect circumstances.

- **Variable skills –** In a training where the goal is to learn a needed skill or function, there will be folks who get it immediately and then check email, and folks who just don't get it. As long as the first folks sit in the back and don't bother anyone, let them go, but remind them of the benefits of hearing different ways of explaining things. Also, if the first part of the class is partly review, and the second half expands on it, state that: "After the break, we'll take what we've reviewed and go on to [things no one has seen before.]"

  For the folks who just aren't getting it, if it's just one or two people, unfortunately the right answer is to offer to work with them after the training and suggest (quietly) that they just watch and not try to follow along on their device. Be compassionate but firm; you need to get as many people as possible trained in as short a time as possible, and dragging the entire class for one learner doesn't benefit everyone or anyone.

- **Notice a theme for pacing?** If you have 20 people in a training, you have to keep the focus on what benefits the majority of people in the training, not any one or two people. Whether those two folks need fun brainstorming, troubleshooting, or extra help, it's your role as trainer to keep the class on track so that everyone learns the stated material. On the flip side, if 15 of those 20 are lost, you can't keep charging on just because 5 people have it down. Offer to let them work on their own through the material and you'll check in, or let them leave early. Use your judgment as a trainer and balance getting through the material and making sure people learn what they need. The more of a technical training it is, the more important this is.

Word choice matters. As the trainer, you're setting the tone not just for this training, but how someone experiences this tool/platform/skill for the first time and possibly for the rest of the time they use it. You're also going to have an impact on how they view themselves as learners, and that affects their emotional state, which affects their ability to learn.

Note: Changing language habits is hard. Be as patient with yourself as you are with your learners. Consistently be mindful and the change will happen over time.

- **Use *straightforward*, not *simple*.** If a process/sequence is straightforward, say that. Saying that it's simple implies that anyone who doesn't get it right away can't understand the simple things, and that's not what you meant (right?). Same for "this isn't hard," or other pre-judgments on the work.

- **Pronouns.** Either avoid using them or use the gender-neutral *they*. People won't notice either of those, but everyone will notice if you only use *he/him* or alternate *he/she* with memorized regularity, or if you use gendered stereotypes as examples. This isn't about social politics, LGBTQ issues, or feminism, it's about respecting your learners for the people they are, same as the previous point.

- **Assumptions, examples, and metaphors.** Choose your examples and metaphors with care, and with balance. Not everyone has a "house," or sometimes even a home. Not everyone drives or has ever driven. All women do not know how to cook. All men do not know how to use power tools. Many women use power tools and many men cook. Use diverse examples and one of them will resonate with your learners.

Conclusion

Regardless of whether you're starting Alma training from scratch or expanding your current offerings, the ideas in this document are here to get you started. They are not the only way Alma training can be provided, and there's always more to add.

If you have suggestions or feedback on this document, please email Jennifer Koerber, Trainer/Consultant, at jennifer.koerber@gmail.com.