

Teaching a Workshop

Software Training Workshop Guidelines

What initiates a software training workshop?

Crisis-driven training

Often workshops are provoked by a crisis:

- Teams are already using the software but are failing in some way
- It is thought that general training in the tool will help
- This is usually a "tool-focused" training

New version releases

Sometimes training is initiated by a new version of software being released

What should initiate a workshop?

Strategic planning

Language programs plan training at just the right time to equip teams to accomplish language program tasks.

Regular intervals

- Technology pace of change is enough that you can assume that the technology you are using today will be new and improved this time next year
- For Africa we have determined a pace of 1 week of training per team per year. Is this realistic in your area?

How can the language technology dept. help?

1. We provide language technology training to improve the efficiency of language program tasks
2. But sometimes our tools accomplish those tasks in ways the project management has not thought of
3. Our job is to know what features of the software will help accomplish which language program tasks

Position yourself for successful training

Overview

1. Inform leadership of new language technology that will help their strategy
2. Learn what tasks the language programs want to accomplish
3. Measure the group's existing skills
4. Create learning objectives that align with the tasks

Inform leadership of new language technology that will help their strategy

When you leave here, you are responsible to share the things that are available with the leadership in your area. Without this step, your training won't be successful because there won't be any training to do. It is your job to look around and see where the tools you have learned about can save time and effort, or can improve quality. As you point this out, people will become aware of the need for training. This needs to be done early, because of the time it takes to arrange training events.

Learn what tasks the group wants to accomplish

Don't accept a general answer. "We want to be able to work on our dictionaries" is not specific enough. If this were broken down, it might result in the following tasks:

1. The participant will use semantic domains to add 300 words to the dictionary as a start, working independently after the training
2. The participant will add example sentences, parts of speech, and Swahili glosses to each of the 300 entries

These are specific tasks, or outcomes, that are important to establish before the training.

Measure the group's existing skills

Test

A test is probably the best way to discover someone's skills, but few people will have the time to put together such a test. If your situation allows it, you can design a test that will give you a clear idea of what their skills are.

Survey

A survey is good when the group is spread out and independent, because it is hard for any one person to know their capabilities. You can use Google Forms, Microsoft Forms, or similar tools to create an interactive survey, and you can easily tabulate the results afterwards. If not everyone has good internet access, it might be better to do an email or printed survey.

Query someone who understands the group

Ask the person who is organizing the training to explain the participants' strengths and weaknesses:

1. What tasks are the users able to do well with the software they are currently using?
2. What tasks are the users able to perform, but not in an efficient way?
3. What tasks are the users unable to perform without more training?
4. What are the pitfalls that they are currently experiencing that prevents them from being successful?

This will enable you to get answers that relate to the tasks, starting with those they can perform well. Both the survey and the query will help you to know your audience and how much time you will need to spend on learning to do the new tasks.

Exercise: Answer the questions in the query above for a group that you know needs training. If you don't know a specific need, create a hypothetical situation and respond for them.

Create learning objectives that bridge the current skills to the desired outcomes

Every class should be customized for its audience. You need to compare the level they are at with where they need to be and design the course accordingly.

This is a good reason to do your own training, rather than bringing in an "expert". If you do bring someone in, make sure that the group's existing skill level and learning objectives are communicated clearly! If you say you want them trained in software x, it is unlikely that the result will be very effective.

If the group has never used WeSay before, your learning objectives will be a bit different than for those who are already using it. You will have to start with an explanation on how to install the software and how to set up the initial project. Here we will assume that the group is already using WeSay, and so our learning objectives for the above tasks would be:

1. The participants or their project administrators will know how to enable Semantic domains, meanings, and parts of speech in the Administrator interface
2. The participants will know how to move between semantic domains and will add 300 words in those categories
3. The participants will know basic parts of speech and be able to add them to the entries
4. The participants will know how to write definitions in the vernacular and will add them for all of the new entries

Exercise: Create learning objectives for the group whose skills you evaluated. We don't care about your precise wording:

The participant shall learn to configure and manipulate the consistency checks. or just **Set up and run the consistency checks** is all the same for this exercise. Just make them descriptive enough so that we have something to measure them by at the end of the course, so you might want to add **so that errors in the text are identified.**

Writing Training Modules

Training modules are a group of learning objectives that are able to be accomplished in the time that is allotted for the class. My preferred training slot is an hour and a half, with lots of time for hands on exercises. Recently, however, I was forced to work in 50 minutes modules. That is OK, as long as the following ratio is observed:

- 40% teaching/demonstration
- 60% hands on learning/exercises

I had to learn this lesson the hard way when I discovered that despite my excellent teaching, very little of it was sticking. I had to cut way back on the amount of information that I was providing, and instead take the time to allow the students to experiment and learn on their own. This is part of the Learning that Lasts^[1] principles:

1. Learner centered
2. Action with reflection
3. Solving Problems
4. Teamwork
5. Self-direction and self-discovery

The training department of SIL Cameroon has put together some training that adapts some of the Learning that Lasts principles for software training. This is what we will use as our model for writing a training module.

Example Module Structure

The following section demonstrates the SIL Cameroon training module structure, which has been adapted from Learning that Lasts principles for software training.

Module Structure Overview

1. **Introduction**
 - Where are we?
 - Why is this important?
 - What will you do?
2. **Demonstration**
3. **Exercises**
4. **Summary**

Introduction

Where are we?

As you present, you the presenter know exactly what you are doing and why you are doing it. Unfortunately, this information does not always come across to the user. What seems very obvious to the presenter is often not at all obvious to the user. The "Where are we" question is designed to show where this task fits into the grand scheme of things. At the beginning of the lesson, it is very important to present how the steps that you will learn in this session fit into the tasks the user hopes to accomplish. This will prevent the question:

Remind me, why are we doing this again?

Remind users of where this fits, not only at the beginning of the lesson, but also throughout the lesson.

Why is this important?

Knowing where you are in the process is only part of the context the user needs. It is also important to remind them why this task is important. What are the consequences of not doing this task? What are the benefits if this task is done? You can present this in the beginning of the class, but you should also stop and remind the users of the benefit of this lesson or step at several points.

What will you do?

This is where you explain what you will be doing specifically in the demonstration, and what they in turn will do for the exercise. Remember that this has to do with the forest and the trees. The menu commands in the software looks like trees do when you are standing in the middle of the forest. They all look the same. You need to give them the view from above, looking down on the forest so that they know what the main goal or direction is before you tell them how to navigate from tree to tree. In the spell checking example, the "What you will do" statement is as follows:

Firstly you need to configure the wordlist and build up a list of correct words. Then you can get the computer to show red squiggly lines under the words it does not know.

- Then you will begin to correct any errors.

Notice how the overarching goal is to **correct spelling errors in the text**. But the students need to be told that what we are doing in the class are all steps towards achieving that goal.

Demonstration

The goal of the demonstration is to show the class the beginning state and the end result, all while watching you perform the steps so they know no magic is involved. It follows, of course, that when they look the other way even for a brief moment, they will miss an important step and not understand how the results were produced.

It is important that laptop screens be tilted forward for the duration of the demonstration. Their eyes are forward on the screen, and they then can grasp the big picture of what is taking place. They will only be willing to do this if you assure them that the teaching module document contains all of the steps necessary to do this on their own.

Exercises

The exercises must be clearly spelled out, and preferably you will include screen shots of important steps along the way. The simplest way to do this is in two passes, once to write the steps and a second pass to take the screen shots. Just perform the operation and write down every step as you do it. There is no dark secret or skill in preparing the materials, if you can do the steps, then you can prepare the document.

For the screen shots, you can use the built-in screenshot tools available on modern operating systems:

- **Windows:** Use Windows Key + Shift + S to capture a region with the Snipping Tool (Windows 10/11), or use the Snip & Sketch app
- **Mac:** Use Command + Shift + 4 to select a region, or Command + Shift + 5 for more options
- **Cross-platform tools:** Free tools like ShareX^[2] (Windows), Flameshot^[3] (Linux/Windows), or Lightshot^[4] (Windows/Mac) allow you to capture images and add arrows, text, and highlighting to identify the buttons or menu items you are pointing to

You may need to time how long it takes to complete the exercise until eventually you get a feel for how much time the students will take on a given exercise. It is important that the exercise gets finished during the class time. You can include bonus steps at the end for students who are more advanced and who will finish before the others.

Lastly, when preparing exercises, vary them so that for some they work on their own and some they work as a team. Sometimes more learning takes place when a group works together as a team instead of as individuals.

Summary

The summary is not absolutely necessary, but it is a very nice touch. It is like a cheat sheet for quick reference to the things that they learned. Do this if you can!

Task-oriented Learning

In a recent workshop on Paratext for Consultants, we made a strong effort to focus only on the tasks that Bible translation consultants would specifically deal with. Here is an example. Please look at these and discuss how they compare to the topics you might normally expect from a Paratext workshop. What is different? What is the same?

Example of task-oriented learning objectives

Paratext for Consultants

1. Doing effective exegetical preparation for a consultant checking session
 - Set up and save workspace
2. Keeping good records of your preparatory notes and comments
 - Consultant notes project
3. Understanding the usage of source language words by searching for them in other contexts
 - Search and source language tools
4. Collaborating with teams to receive their text and back translations and send comments
 - Send and Receive
5. Taking notes during a checking session and sending it in a report afterwards
 - Using notes
6. Helping teams check their use of Biblical key terms
 - Using the Biblical Terms tool
7. Helping teams follow key term usage during drafting, and adding terms to the glossary
 - Using the Biblical Terms window, Using glossary tab
8. Checking to see if the team is making progress and if they are making the changes you agreed upon
 - Project History
9. Set up the spell checker to provide useful suggestions to the team
 - Spell checking
10. Making sure that you receive the back translation and that it is up to date with the translated text
 - Back translation projects and Interlinear text

Discussion

Not just computer training... we need to work together with the specific domain to create content for an integrated approach to training. We strongly resisted calling this "Paratext Training"

How can you work together with the existing training that is happening in your entities to integrate technology:

- Literacy
- Anthropology
- Translation
- Linguistics

Planning a workshop

Key planning questions

- How will the cost be covered?
- How far in advance should it be planned?
- Rule of thumb: One week of tech training per project per year

Basic planning information

1. Date:
2. Place (in-person or online platform):
3. Workshop Title:
4. Objectives:
5. Target Audience:
6. Prerequisites:
7. Programs used:
8. Length:
9. Leaders to contact:
10. Resource people to contact:
11. Training materials exist?

Exercise: (Monday or Tuesday) Plan a workshop with the above details. Get together with someone from your area if possible.

Training pitfalls

Don't put people of varying levels in the same course

Assess the training goals and divide a course into smaller, progressive segments. That way, users can decide which parts of the course they want to attend. You don't waste their time while explaining simple tasks when they are only interested in more advanced tasks.

Don't cover more than they can handle

Better by far to teach a single program thoroughly, than to teach several programs poorly.

Don't do menu-based instruction

Your goal is to demonstrate the software as a tool to accomplish a task. The user must organize his/her knowledge of the software around tasks to be accomplished, rather than around the menu structure, which may have no rhyme nor reason.

Don't forget to specify prerequisites

A complete computer novice will substantially slow down the course, causing frustration for the novice, the trainer, and the rest of the class.

Don't fail to supply printed or electronic documentation

Unconfident users will try to write down every step that you tell them. Beat them to it and supply all of the steps in advance. Then they can give their full attention to the course.

Don't fail to provide concrete exercises with sample data

Don't forget to specify hardware/software requirements in advance

Logistics

Display and Screen Sharing

For in-person training

- **Projector setup:** Modern projectors typically support Full HD (1920 x 1080) resolution. Set your laptop to duplicate or mirror your display so you're not looking over your shoulder
- **Display arrangement:** Position the projector screen where all participants can see clearly without straining
- **Cable management:** Secure cables to prevent tripping hazards and accidental disconnection
- **Power protection:** Use a UPS (uninterruptible power supply) if power is unstable. Sudden power loss can damage equipment and wastes time waiting for systems to restart
- **Lighting:** Ensure adequate screen visibility while maintaining enough ambient light for participants to see their own screens and take notes

For online training

- **Screen sharing:** Test your screen sharing setup before the workshop. Consider sharing a specific window rather than your entire screen to avoid distractions
- **Resolution:** Set your display to 1920 x 1080 or lower to ensure content is readable for all participants
- **Recording:** Consider recording sessions (with participant permission) for those who need to review or miss portions
- **Platform features:** Familiarize yourself with breakout rooms, polling, and chat features in platforms like Zoom, Microsoft Teams, or Google Meet
- **Bandwidth:** Test your internet connection and have a backup plan (mobile hotspot) in case of connectivity issues

Amplification

I consider that I have a reasonably loud voice, but I prefer to use a microphone because:

- People are more likely to pay attention when they don't have to strain to hear you
- You don't want to lose your voice after talking loud for a couple hours
- For online training, a quality headset or external microphone significantly improves audio clarity

Documentation and Resource Sharing

For in-person training

- Provide a USB drive or local network share with training materials
- Consider setting up a local wiki or file server for easy access to documentation

For online training

- Use cloud storage services (Google Drive, OneDrive, Dropbox) to share materials before and during the workshop
- Consider using a learning management system (LMS) or shared workspace (Notion, Microsoft Teams) for organized material distribution
- Share links in the chat and follow up with email to ensure all participants have access

Technical Setup Recommendations

If you are able, set up a shared documentation platform with the training content using modern wiki or documentation tools such as:

- **Notion** (collaborative workspace with rich formatting)
- **Confluence** (enterprise wiki platform)
- **GitBook** or **MkDocs** (documentation sites from Markdown)
- **Microsoft SharePoint** or **Teams** (integrated with Microsoft 365)
- **Google Sites** (simple, accessible wiki alternative)

After the workshop, the content can be moved to your organization's permanent documentation platform. These platforms offer better collaboration features, version control, and accessibility than older wiki solutions.

Appendix

Read Why Consultants Teach Workshops^[5]

Read Step by Step Guide: Design Your Workshop^[6]

Read Reflect, Report, Refine^[7]

^[1] <http://learningthatlasts.org/node/106>

^[2] <https://getsharex.com/>

^[3] <https://flameshot.org/>

^[4] <https://app.prntscr.com/>

^[5] <https://lingtran.net/WhyConsultantsTeachWorkshops>

^[6] <https://lingtran.net/DesignYourWorkshop>

^[7] <https://lingtran.net/ReflectReportRefine>