How to Create Effective Training Manuals

2nd Edition

Mary L. Lanigan, Ph.D.
Third House, Inc.
Tinley Park, Illinois 60477
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>4</td>
</tr>
<tr>
<td>Introduction</td>
<td>5</td>
</tr>
<tr>
<td>Objectives</td>
<td>5</td>
</tr>
<tr>
<td>Outline</td>
<td>5</td>
</tr>
<tr>
<td>Background Information</td>
<td>6</td>
</tr>
<tr>
<td>Step 1: Complete a Front-end Analysis</td>
<td>6</td>
</tr>
<tr>
<td>Step 2: Divide the Content into Modules</td>
<td>6</td>
</tr>
<tr>
<td>Step 3: Select a Style Manual</td>
<td>7</td>
</tr>
<tr>
<td>Creating the Training Manual</td>
<td>8</td>
</tr>
<tr>
<td>Chunk Material and use Transitions</td>
<td>8</td>
</tr>
<tr>
<td>Writing is Easy to Read</td>
<td>11</td>
</tr>
<tr>
<td>Leave White Space</td>
<td>11</td>
</tr>
<tr>
<td>Use Images</td>
<td>11</td>
</tr>
<tr>
<td>Use Bullets</td>
<td>12</td>
</tr>
<tr>
<td>Visually Appealing</td>
<td>12</td>
</tr>
<tr>
<td>Provide Practice</td>
<td>13</td>
</tr>
<tr>
<td>Edit the Draft Training Manual</td>
<td>14</td>
</tr>
<tr>
<td>Finalize the Training Manual</td>
<td>16</td>
</tr>
<tr>
<td>Front Contents</td>
<td>16</td>
</tr>
<tr>
<td>Back Contents</td>
<td>21</td>
</tr>
<tr>
<td>Binding</td>
<td>23</td>
</tr>
<tr>
<td>Summary</td>
<td>26</td>
</tr>
<tr>
<td>Appendix</td>
<td>27</td>
</tr>
<tr>
<td>References</td>
<td>32</td>
</tr>
</tbody>
</table>
Welcome

These guidelines have been written for a training context in which a training manual will be the main delivery source for the educational experience. The manual will neither compliment a stand-up trainer nor will it be downloaded from an Internet training session. Instead, this training manual will be used as a self-study tool. While most of the guidelines also hold true for a training manual that compliments a stand-up or Internet delivered training, the focus of these guidelines is on a self-study manual. For more information about an instructor-led manual, see the Appendix.

Pre-requisite Skills

This manual is written for an audience that already is familiar with front-end analyses. You should know, at the very least, how to carry out a task listing and how to construct a structured lesson. You should also have the skills to do screen captures, usability testing, and creating documents in Word software.
Introduction

The purpose of this manual is to guide instructional designers on how to create effective training manuals. The benefit of learning this information is to create professional-looking educational tools that will serve your clients well. It is important to implement the information within this manual in order move your clients to optimal levels of performances.

Objectives

At the end of this lesson, you will be able to:

- Write a training manual;
- Edit a training manual; and,
- Appropriately bind a training manual.

Outline

Complete a Front-end Analysis
Divide the Contents into Modules
Select a Style Manual
Create a Training Manual
Edit a Training Manual
Bind a Training Manual
There are three steps you should take before composing your training manual.
1. Complete a front-end analysis.
2. Divide the contents of your training into modules.
These steps are similar to designing any other performance improvement intervention.

**Step 1: Complete a Front-end Analysis**
Before writing a training manual, you should have completed some type of front-end analysis, including task analysis. By doing so, you will have created, at the very least, a task listing of terminal and enabling objectives for the cognitive and behavioral tasks you plan to teach within the training manual. You should also have a list of performance objectives that manifested from the task listing. The task listing and performance objectives will guide the outline of your training manual. The outline should follow the task listing in the sense that all pre-requisite skills should be presented before more advanced skills.

**Step 2: Divide the Contents of Your Training into Modules or Chapters**
After outlining the content domain of your training, divide the content of your training into modules or chapters. Each module will then be set-up as a structured lesson.

A structured lesson includes an *Introduction*, *Background*, *Target*, and *Summary* sections. Each section contains specific information. For example, the *Introduction*
contains an opening paragraph or two that outlines the manual’s purpose, benefits, importance, and how it relates to previous lessons. This section also includes a list of objectives that students will master and an outline of materials to be covered. The Background, Target, and Summary sections also contain prescribed tasks. For more information about these sections or writing a structured lesson, go to the instructional CD, Performance Technology Overview 2nd Edition.

Step 3: Select a Style Manual and Prepare a Style Sheet to Ensure Consistency

After creating your structured lesson, next select an appropriate style manual to aid you in editing your work.

There are three popular style manuals to select from such as the American Psychological Association (APA), the Modern Language Association (MLA), and the Chicago Manual of Style (CMS). All three of these manuals offer extensive guidelines on how to present information, including how to cite rights and permission, grammar and usage, punctuation, spelling, names, numbers, foreign language, quotes, illustrations, tables, math, abbreviations, references, indexes, and more.

In addition to using a style manual, you may wish to create a style sheet. A style sheet helps the writer ensure that the training manual looks consistent. For example, if the main headings are Arial, 14-point font and the sub-headings are Arial, 12-point font, then all main and sub-headings should follow suit. The manual would look less professional if some of the headings were Arial 14 while others were Times New Roman 12, or if the sub-headings were listed in various font sizes from 10 to 18. Besides listing heading sizes, the style sheet notes the rules the writers and editors will follow. For example, if there is special punctuation used or unusual terminology, then the style sheet would note the guidelines to follow for these cases.
There are three main steps to creating training manuals.
1. Write the draft manual.
2. Edit the draft manual.
3. Finalize the training manual.

Step 1: Write the draft of the Training Manual
When writing your draft manual, implement these tips:
- Chunk information and create transitions;
- Write so your text is easy to read;
- Use white space;
- Use bullets;
- Create visual appeal; and,
- Provide practice and feedback.

Let’s review each tip in detail to aid you in creating effective training manuals.

A. **Chunk material** into shorter; albeit logical, sections. **Connect sections with transitions.** Make sure steps are in **logical order**.

Trainees will be overwhelmed by huge amounts of text grouped together. To reduce their anxiety and engage them in your training materials, create shorter paragraphs. Place the paragraphs in logical order. As you present your information, you want to chunk your ideas into units or paragraphs. A paragraph typically possesses four elements.

1. A main idea.
2. An explanation of the main idea, i.e., the presenter’s rationale.
3. Examples and/or non-examples to illustrate the explanation.
4. A completion of the idea and transition into the next topic.
In addition to presenting ideas in cohesive chunks, incorporate effective transitional statements between paragraphs and ideas to help your audiences understand how you are moving from one idea to the next. Transitions are frequently made up of transitional devices. A transitional device cues the listeners to a connection between thoughts. Below are some examples.

<table>
<thead>
<tr>
<th>Transition Devices</th>
<th>Example Words Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addition</td>
<td>and, in addition to, furthermore, moreover, besides, too, also, another, equally important, first, second, etc., again, further, next, likewise, similarly, in the same way</td>
</tr>
<tr>
<td>Illustration</td>
<td>thus, for example, for instance, namely, to illustrate, in other words, in particular, specifically, such as</td>
</tr>
<tr>
<td>Emphasis</td>
<td>above all, of course, certainly, surely, in fact, really, in truth, again, besides, also, furthermore, in addition</td>
</tr>
<tr>
<td>Examples</td>
<td>for example, for instance, to illustrate, thus, in other words, as an illustration, in particular</td>
</tr>
<tr>
<td>Suggestion</td>
<td>for this purpose, to this end, with this in mind, therefore</td>
</tr>
<tr>
<td>Summary</td>
<td>therefore, finally, consequently, thus, in conclusion, in brief, as a result</td>
</tr>
</tbody>
</table>
Along with using transitions and chunking materials, you want to present information in a logical order, especially if you are writing a procedural manual like this one. Communicate pre-requisite steps before advanced behaviors. For example, if you are teaching basic instructional design skills, then you'd expound on how to write effective performance objectives before educating the trainees on how to write training evaluation instruments. Likewise, you want to define terms and concepts before you require the trainees to analyze or apply steps. For example, if you are instructing trainees how to create job aids, then define and illustrate a job aid first. Additionally, use examples to explain what you are communicating. You may elect to mix up your examples by using illustrations, case studies, etc. You may also wish to incorporate an action table when describing procedures as illustrated below.

### HOW TO CARRY OUT A BEHAVIORAL FREQUENCY COUNT

Now that you understand what a behavioral frequency count is and when to use it, next you will see the steps needed to carry out this technique.

Here are the steps to follow to carry out a behavioral frequency count.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select and define the behaviors to be observed and counted.</td>
<td><img src="image1" alt="Example 1" /></td>
</tr>
</tbody>
</table>
|      | *Observe:* teacher delivery style  
|      | *Count:* student participation |
| 2    | Go into field, count, and record the occurrence of behavior for a specific time. | ![Example 2](image2)  
|      | *Oh, teacher!* |

When depicting procedures make sure you don’t leave out steps that may seem like common-sense to you but may not to novice users. If you have successfully completed a front-end analysis, then you should have a good idea on how much your learners know and don’t know. If you are unsure of your trainees' knowledge and skill levels, then it is better to provide more details than less; albeit, you don’t want to overwhelm them with information.
B. In addition to chunking and transitioning your materials, make sure the **writing is easy to read**. Avoid jargon whenever possible unless you have defined those unusual terms before-hand. **Use the active voice.** Be consistent in tone and style of writing.

**EXAMPLE**

**Active Voice:** Sally wrote a training manual  
**Passive Voice:** The training manual was written by Sally.

C. While it's important to write in an active voice, it is also vital not to overwhelm trainees with blocks of text. **Leave white spaces** between chunks of ideas and other logical groupings. White space makes the material look less intimidating.

D. In addition to appropriate space, **use images** to enhance the writing. You know the saying, “**A picture is worth a thousand words.**” Use images that help communicate your message beyond the written word.
E. Another way to help trainees understand your message is by offsetting important text with bullets. **Use bullets** to offset text, especially when listing items. Use bullet points to help the readers see important information. It also aids those who might be perusing your manual instead of truly reading it.

**EXAMPLE**

- Use bullets to create lists
- Use bullets to offset information
- Bullets can also be numbers or letters

F. By incorporating all the above tips, you’ll be on your way to creating visually stimulating manuals. Moreover, create a **visually appealing** manual by

![Module 1 Using Word Features To Enhance Your Job Aids](image)

presenting the pages in a manner that attracts the reader to it. Select font styles and sizes that are easy to read. Moreover, use chapter and/or module dividers, especially in colors that offset the pages. Lastly, don’t forget to incorporate page numbers at the bottom of the pages as illustrated in this manual.
G. Even though a manual may look good, it is worthless if it doesn’t educate its users. Therefore, provide **practices and feedback** throughout. A quality training manual always provides the trainees with a number of exercises and/or practices to reinforce the materials they are learning. These practices are included throughout the manual but especially in the target lesson. More practice is better than less because repetition is the mother of skill. Along with practice is feedback. The trainees need communication mechanisms that tell them how well they are doing. Make sure they know how to obtain feedback. Don’t hide it in the Appendix unless you tell them where to locate the answers and/or feedback.

**Practice Exercise for Step One**
Write the correct answer to each question.

1. What are the four elements to a paragraph?

2. Name two transitional devices?

3. What is the table called that lists steps, actions, and examples?

4. **True** or **False**: You don’t want too much white space in order that the manual doesn’t become too long.

5. What technique helps the reader see important information easily?

Answers are listed in the Appendix – see page 30.
You now have created a draft manual. The next step is to edit it.

**Step 2: Edit the Draft Training Manual and Complete Usability Tests**

Edit the draft manual to make sure the contents are accurate, clear, and comprehensive. To achieve this goal, read the manual out loud. While reading it, ask yourself these questions.

- Does this sentence make sense?
- Does the sentence or paragraph fully communicate my ideas?
- Do I have enough transitions built into the manual to move the reader from idea to idea?

In addition to asking these questions, make sure you read your manual for meaning rather than for sound. Some misguided writers think if their writing sounds impressive even though readers cannot comprehend their meaning, then their work is effective. Readers need to understand what you are communicating. They won’t necessarily fill in your illogical gaps. Instead, write your instructions so readers don’t have to guess what you are trying to say.

After editing your manual a number of times, next test the materials on people who are like your trainees. Complete usability tests to make sure the training manual is fully functional. To do so, follow the steps presented in the usability testing module found in the instructional CD, *Performance Technology Overview 2nd Edition*. If time and/or money prevent you from carrying out full blown usability tests, then at the very least have a colleague or two read your manual and provide feedback.
Practice Exercise for Step Two
Read the text below for meaning and circle those areas where you believe gaps in logic have occurred. Fill-in the gaps by writing sentences that would aid in creating greater meaning from the writer to the reader.

How to Effectively Walk a Dog

Everyone thinks walking a dog is easy. You simply put a collar on a dog, attach a leash, and begin walking. The process is more complex than meets the eye.

A harness is worn over the body of the dog rather than around his neck. This allows him greater movement without choking major body parts. The leash is then connected to the harness.

Proper body alignment of dog to owner is critical to effectively walk a dog. In other words, the owner’s body should be closer to people who pass-by. You don’t want the dog walking close to people who walk or run-by so that he doesn’t chase or bite them.

All owners need to have their dogs understand three commands: stay, sit, and no. Sometimes a dog will also need to sit. Additionally, no is a command that will almost always be used in order to prevent the dog from chasing rabbits or squirrels, eating things he shouldn’t, and smelling other dogs’ behinds.

Answers are listed in the Appendix – see page 30.
At this point, you have edited your manual a number of times and carried out usability tests. You are now ready to complete the manual. The final step contains three main parts: Adding Front Contents; Back Contents; and, Binding.

**Step 3**

**Part A: Finalize the Training Manual by Adding the Front Contents**

Write the introductory materials for the training manual such as the title page, publisher and copyright page, things to note page, and table of contents.

**Title page:** State the title; sub-title, if the manual has one; and, author’s name.

![Example Title Page](image)

You may also wish to state the company and organizational location on this page. After completing this page, move onto the copyright page.
Publisher and Copyright page: State the manual title, the copyright symbol along with the publisher or author’s name (depending on who owns the copyright), the company’s name and address as well as the URL, if appropriate.

You want to include a paragraph reserving your rights. You need to stipulate what rights, if any, you wish to reserve.

Indicate the liability limits, if any. Also, indicate any warranties or disclaimers.

If there are trademarks used, then you want to indicate those. You want to list the company name and the trademarks they hold.

You may also wish to indicate where the manual is printed. Moreover, if you have an International Standard Book Number, then indicate the ISBN number. After completing the items listed above, move onto writing a Table of Contents.
**Table of Contents**: You want to include a detailed *Table of Contents* that includes chapter headings, main headings, and sub-headings.

Make sure you double-check your work so that each page cited matches the corresponding topic. If you edit your work after creating the table, don’t forget to check if any contents shifted to a new page. After creating this page, write your preface or welcome page.
Preface, Welcome, or Things to Note Page: There are a number of items you may wish to include on this page. Here are some examples.

A. What is the purpose of the manual?

B. What equipment and/or materials are needed beside the manual to complete the training?

C. Are there any pre-requisite knowledge and skills needed to complete the manual? This might include a glossary of terms, if needed.

D. List any obstacles a trainee might uncover and how to overcome these problems. If you are teaching highly technical skills such as providing software skills, then you may have an extensive trouble-shooting section in the back of the manual. If you provide such an addendum, then note that in the preface page so the trainees know where to look for this information.

E. Encourage trainees to follow the order of the manual in order not to miss any pre-requisite skills.

F. If you have a help resource person, then tell the trainees how to contact him or her.
Practice Exercise for Step Three

Answer the questions below. To see if your answers are correct, go to the Appendix – see page 31.

1. Name four pages that come before the main body of the training manual?

2. Besides the copyright and author or publisher information, name two additional items that might appear on the Copyright page.

3. Name six items that might appear in the Preface or Things to Know page.
Besides composing front-end materials, your manual will need some back-end pages.

**Step 3**

**Part B: Finalize the Training Manual by Adding the Back Contents**

Write the back contents for your manual. The contents in the back of the manual include: Addendum; References; and, Index. You need to decide if you wish to have individual addendum and reference sections following each module, or if you want one large addendum and reference section for the entire manual.

**Appendix or Addendum:** Each Addendum section is unique. See the Appendix in this manual to see an example. While perusing the Addendum, also review the references because that is the next section you’ll need to develop.

**References:** The reference section should be designed and written following the guidelines of your style manual. For example, if you use the APA manual, then your references would look something like the example below.

### REFERENCES


After writing and editing your references, next you will develop an index.
Index: A detailed index helps trainees find information quickly. The index is optional depending on how detailed the manual is. There is also a cost factor involved, in that, indexing takes time and money. Therefore, consider if an index is cost-effective to have within your manual or not.
Once you create your front and back materials and are committed to your final edits for the entire manual, then you are ready to bind it.

**Step 3**  
**Part C: Bind the Training Manual and Attach Ancillary Items**

You want to bind the training manual in a way that is most suitable for the user. For example, if the user needs to position the manual flat on a table while working on a computer, then perhaps a **spiral bound manual** might be the best binding.

On the other hand, if the trainee is going to refer back to the manual frequently, then the spiral bound manual may be prone to rips and tears. If durability is more important than being able to lay the book flat, then a **book binding** may be more appropriate.
A book-type binding doesn’t allow for quick updates or changes. Therefore, if you need a training manual that can be pulled apart and new information added, then a three-ring binder may be the best option.

In addition to the binding, you also want to consider if the training manual is going to house other things such as CDs, job aids, etc.

If you are including a CD with the manual, determine how you will house the CD. For example, do you want to buy stick-on CD holders to attach to the back of the manual?

Perhaps, you might buy a CD holder that has a three ring attachment. Or, you might wish to consider if you are including additional information such as job aids or maps or other like products, then you need to consider how the training manual will house those materials.
Finally, consider any information that might be needed on the back cover of the training manual. A summary of the books’ content, highlights, the ISBN number, and price are often listed on the back cover.

You have now created an effective training manual. Congratulations!
In this lesson you learned the three pre-requisite steps to complete before creating training manuals. You also learned when drafting a training manual to make sure the material is:

- chunked;
- connected with transitions;
- easy to read;
- incorporates white spaces;
- uses images;
- uses bullets;
- is visually appealing; and,
- provides practices and feedback.

You learned when finalizing the training manual, you need to complete usability tests before adding the remaining front and back pages. You also learned about the elements required in the front and back of the manual. Lastly, you learned how to bind the manual.
Student Training Manuals used with a Live Instructor

Manuals that accompany a live training are not necessarily as detailed as self-study manuals because trainers are there to offer verbal guidance. Unlike a self-study manual that needs to communicate to trainees what equipment and materials are needed to complete the lessons, a teacher-led training manual doesn’t need such information because the trainer will provide these things to the students. Likewise, communication gaps can be filled by a trainer if something is unclear in a training manual that accompanies a live training. In contrast, a self-study manual has to anticipate these communication gaps and close them.

Instructional designers creating training manuals that accompany live instruction, unlike self-study, have to strategize how to integrate the training manual materials with the live instruction. The two have to work together, not necessarily repeat or mimic each other. This guideline is also true for training manuals that are created as a compliment to some type of computer-based-training workshop, no matter if it is delivered on the Internet or CD.

Instructor’s Manual

If you are creating a live training, then more than likely you will also need to write an instructor’s manual in addition to the student-manual. The instructor’s manual will be similar to the student-manual but it will also contain additional information. Below are four examples.

1. While some script may be necessary to give the instructor a feel for what you want them to say, don’t expect them to communicate everything word for word. Instead they will more likely paraphrase what needs to be communicated so they sound natural while delivering the training information.

2. Instructors typically walk around the training room, use technologies, and other visual aids as they deliver instruction. Therefore, the instructor’s manual has to be mobile and easy to read with a quick glance. Large print inside the manual will help achieve this goal. You may also wish to highlight information that needs to be stressed. In some cases a text box containing questions and answers might help offset the materials.

3. A critical feature to any instructor’s manual is a timing device. There is the overall time for the training. There is the breakdown of time for each module. And there are the minutes it takes to get through each section of each module, including all
presentation segments, exercises, debriefs, breaks, lunch breaks, etc. The instructor's manual highlights these times.

4. Additionally, the instructor’s manual should also indicate the following:
   
   o Classroom layout
   
   o Location of rest rooms, library, computer-labs, eating spots, etc.
   
   o All test and answers; exercises and supplies needed to carry out the exercise; all answer keys, etc.
   
   o Any helpful hints and extra tidbits the instructor might use.
   
   o PowerPoint overheads and/or handouts.
Practice Exercise Answers for Step One

1. A main idea; an explanation; examples; completion of an idea; and, transition.

2. Addition; Illustration; Emphasis; Examples; Suggestion; Summary

3. Action Table

4. False

5. Bullet points

Practice Exercise Answers for Step Two

The text type in red are sentences added to fill in the gaps created in the original document. Notice the difference in meaning between the original version of the text to the edited version below.

How to Effectively Walk a Dog

Everyone thinks walking a dog is easy. You simply put a collar on a dog, attach a leash, and begin walking. The process is more complex than meets the eye. **There are three critical steps to walking a dog: harnessing, body alignment, and commands.**

When a dog goes for a walk, he should wear a harness. A harness is worn over the body of the dog rather than around his neck. This allows him greater movement without choking major body parts. The leash is then connected to the harness. **The leash aids in moving the dog to the correct position next to his owner.**

Proper body alignment of dog to owner is critical to effectively walk a dog. **The dog should always be on the inside of the owner.** In other words, the owner’s body should be closer to people who pass-by. You don’t want the dog walking close to people who walk or run-by so that he doesn’t chase or bite them. **Such mishaps can be prevented by having the owner’s body acting as a wall between walkers and the dog.** Besides using her body, the owner can use commands to aid in effectively walking her pooch.

All owners need to have their dogs understand three commands: stay, sit, and no. **There will be times during walks where the owner will need to command the**
dog to stay in order to allow other dogs or children to pass-by. Sometimes a dog will also need to sit. For example, when larger dogs greet smaller dogs, sometimes having the large dog sit or lay is more inviting to the smaller pooch. Additionally, no is a command that will almost always be used in order to prevent the dog from chasing rabbits or squirrels, eating things he shouldn’t, and smelling other dogs’ behinds.

Practice Exercise Answers for Step Three

1. Name four pages that come before the main body of the training manual?
   Title; Copyright; Table of Contents; and Preface or Things to Know

2. Besides the copyright and author or publisher information, name two additional items that might appear on the Copyright page.
   Rights reserved; Limits of Liability; Warranties; ISBN number

3. Name six items that might appear in the Preface or Things to Know page.
   Manual purpose; Equipment; Pre-requisite knowledge; Possible obstacles; Emphasis on following the order; Help resource person
