About This Book

Why is this topic important?

Continuing education and development lie at the very heart of any successful organization. Time and time again, studies show that the best organizations, those that deliver better-than-average return on investment, also happen to be the ones with the highest commitment to training and development. Moreover, training has become a powerful ally in the war for talent. Job seekers frequently cite a strong commitment to development as one of the principal reasons for joining or remaining with an organization.

What can you achieve with this book?

In your hands is a working toolkit, a valuable source of knowledge for the training professional. Offering entirely new content each year, the Pfeiffer Training Annual showcases the latest thinking and cutting-edge approaches to training and development, contributed by practicing training professionals, consultants, academics, and subject-matter experts. Turn to the Annual for a rich source of ideas and to try out new methods and approaches that others in your profession have found successful.

How is this book organized?

The book is divided into four sections: Experiential Learning Activities (ELAs); Editor’s Choice; Inventories, Questionnaires, and Surveys; and Articles and Discussion Resources. All the material can be freely reproduced for training purposes. The ELAs are the mainstay of the Annual and cover a broad range of training topics. The activities are presented as complete and ready-to-use training designs; facilitator instructions and all necessary handouts and participant materials are included. Editor’s Choice pieces allow us to select material that doesn’t fit the other categories and take advantage of “hot topics.” The instrument section introduces reliable survey and assessment tools for gathering and sharing data on aspects of personal or team development. The articles section presents the best current thinking about training and organization development. Use these for your own professional development or as lecture resources.
About Pfeiffer

Pfeiffer serves the professional development and hands-on resource needs of training and human resource practitioners and gives them products to do their jobs better. We deliver proven ideas and solutions from experts in HR development and HR management, and we offer effective and customizable tools to improve workplace performance. From novice to seasoned professional, Pfeiffer is the source you can trust to make yourself and your organization more successful.

Essential Knowledge  
Pfeiffer produces insightful, practical, and comprehensive materials on topics that matter the most to training and HR professionals. Our Essential Knowledge resources translate the expertise of seasoned professionals into practical, how-to guidance on critical workplace issues and problems. These resources are supported by case studies, worksheets, and job aids and are frequently supplemented with CD-ROMs, websites, and other means of making the content easier to read, understand, and use.

Essential Tools  
Pfeiffer’s Essential Tools resources save time and expense by offering proven, ready-to-use materials—including exercises, activities, games, instruments, and assessments—for use during a training or team-learning event. These resources are frequently offered in looseleaf or CD-ROM format to facilitate copying and customization of the material.

Pfeiffer also recognizes the remarkable power of new technologies in expanding the reach and effectiveness of training. While e-hype has often created whizbang solutions in search of a problem, we are dedicated to bringing convenience and enhancements to proven training solutions. All our e-tools comply with rigorous functionality standards. The most appropriate technology wrapped around essential content yields the perfect solution for today’s on-the-go trainers and human resource professionals.

Pfeiffer  
www.pfeiffer.com

Essential resources for training and HR professionals
The Pfeiffer Annual Series

The Pfeiffer Annuals present each year never-before-published materials contributed by learning professionals and academics and written for trainers, consultants, and human resource and performance-improvement practitioners. As a forum for the sharing of ideas, theories, models, instruments, experiential learning activities, and best and innovative practices, the Annuals are unique. Not least because only in the Pfeiffer Annuals will you find solutions from professionals like you who work in the field as trainers, consultants, facilitators, educators, and human resource and performance-improvement practitioners and whose contributions have been tried and perfected in real-life settings with actual participants and clients to meet real-world needs.

The Pfeiffer Annual: Consulting
Edited by Elaine Biech

The Pfeiffer Annual: Training
Edited by Elaine Biech

Michael Allen’s e-Learning Annual
Edited by Michael Allen
Call for Papers

How would you like to be published in the Pfeiffer Training or Consulting Annual? Possible topics for submissions include group and team building, organization development, leadership, problem solving, presentation and communication skills, consulting and facilitation, and training-the-trainer. Contributions may be in one of the following three formats:

- Experiential Learning Activities
- Inventories, Questionnaires, and Surveys
- Articles and Discussion Resources

To receive a copy of the submission packet, which explains the requirements and will help you determine format, language, and style to use, contact editor Elaine Biech at Pfeifferannual@aol.com or by calling 757-588-3939.
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The Story of the Kirkpatrick Four Levels: Evaluating in the Moment
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Contents of the Companion Volume, The 2012 Pfeiffer Annual: Consulting
Pfeiffer Publications Guide
Our readers are invited to download customizable materials from this book related to the experiential learning activities and the instruments, as well as a PDF of the book text. The following materials are available FREE with the purchase of this book at: www.pfeiffer.com/go/training2012.

The following username and password are required for accessing these materials:

Username: training
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Experiential Learning Activities

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Julie O’Mara

Twenty-Five Ways to Include Others

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Classroom Instructor Skills Survey, Jean Barbazette

Classroom Instructor Skills Survey
Classroom Instructor Skills Survey Scoring Sheet
Classroom Instructor Performance Plan

Institutional Climate Survey, K.S. Gupta

Institutional Climate Survey
Institutional Climate Survey Scoring Sheet

PDF

The book text is available in PDF format.
Happy 40th anniversary! Yes, the Pfeiffer Annuals have been published since 1972. For forty years the Annuals have set the standard in form, format, and functionality for experiential learning activities (ELAs).

Experiential learning can be traced back to 500 BC when Confucius, China’s most famous teacher, philosopher, and political theorist, is purported to have claimed, “I hear, I know. I see, I remember. I do, I understand.” Experiential learning has been recognized as critical to human development by experts such as Carl Rogers, Maria Montessori, John Dewey, David Kolb, and scores of others.

Although experiential learning has been around for eons, the Pfeiffer Annuals are recognized as the most definitive source for describing a precise model for ELAs, now the basis of work for every trainer, consultant, and facilitator. The Annuals’ first editors had an “interest in providing a distinctive model of human relations training . . . toward experiences that produce generally predictable outcomes.” That model lives today between the covers of the Pfeiffer Annuals. The model includes two parts: (1) how to design ELAs on paper so that everyone can understand the process, as well as (2) how to conduct a true ELA using the recognizable Pfeiffer Experiential Learning Cycle: experiencing, publishing, processing, generalizing, and applying.

Many leaders from academia, business, consulting, and training have published some of their best work in the Annuals. Some names you may know include Karl Albrecht, Jean Barbazette, Richard Beckhard, Geoff Bellman, Warren Bennis, Ken Blanchard, Warner Burke, Jack Canfield, Marshall Goldsmith, Len Goodstein, Paul Hersey, Bev Kaye, Jim Kouzes, Ed Lawler, III, Karen Lawson, Ron and Gordon Lippitt, Julie O’Mara, Uday Pareek, Bob Pike, Allison Rossett, Ed Schein, and Thiagi. Readers have been loyal to a resource that publishes the best of the best, like these authors.

During the forty years, the Annuals have grown from one volume to two and have introduced features and changes that ensure ease of use by readers. For example, most recently the Training and Consulting Annuals have presented themes. Our profession covers a wide variety of topics, and the themed Annuals have been successful with our readers and our authors because they help to narrow the focus; we
can also publish several related articles and activities in one concentrated space. The theme for 2012 is “Learning in the Moment.”

Both Annuals present a broad array of activities and articles that support the theme this year. The Training Annual presents eight Learning in the Moment submissions and the Consulting Annual provides ten Learning in the Moment submissions. In addition to the themed submissions, both Annuals continue to present other topics that help you do your job: teamwork, leadership, communication, problem solving, and so forth. The Learning in the Moment theme helps to focus some of our master contributors’ talents in the 2012 volumes. Please let us know if you have suggestions for a theme in future years.

What is the meaning of our 2012 theme? How do we define “Learning in the Moment”? Everyone is bombarded with an overflow of information. The most successful people know what to do with that information. This occurs when the information is coupled with the knowledge and skills of implementation; “just-in-time” learning is what it was called back in the 1970s.

The introduction of the “blended” learning concept a decade ago legitimized the idea that learning occurs anywhere and at any time; learning doesn’t just happen in a classroom. A broad range of learning activities may be described as a part of Learning in the Moment: web search tools, mentoring, coaching, e-coaching, communities of practice, various e-learning events, chat rooms, blogging, yammering, and tweeting.

Why is this theme meaningful? Learning in the moment, just-in-time learning, learning on the fly, whatever you call it, is critical for everyone in the workplace: customer-service professionals, sales people, manufacturing line workers, military, supervisors, managers, dairy farmers, and even executives. What truly makes this theme critical are the statistics. To begin, ASTD’s State of the Industry data shows that instructor-led training has decreased to just over 60 percent of total training. But that only refers to formal, planned learning. Other statistics suggest that talent development is better described using a 70-20-10 model. That is, 70 percent of learning and development occurs on the job, 20 percent occurs through coaching and mentoring relationships, and 10 percent occurs through formal training.

The profession recognizes the importance of moving away from time-constrained methods that include lengthy needs assessments, multiple-step design efforts, numerous pilot programs, and extended interventions. Both trainers and consultants are aware that providing ways to learn skills and knowledge at the moment when the learner needs them is critical. They know that prolonging the solution prevents their organizations from maintaining a competitive advantage.

This means that the biggest question is not what or why, but how? How can we as internal and external trainers and consultants ensure that we have the tools to use to help employees develop skills and knowledge in the moment?
Many trainers and consultants have already changed their learning philosophy to adapt to Learning in the Moment. Exploring and considering a few of these ideas will help you continue to make a strong transition:

- Recognize that learning is a day-to-day activity, not a singular event.
- Find ways to change behaviors and attitudes, not just enhance skills and knowledge.
- Identify how to embed learning on the job in a natural, easy-to-use process.
- Prepare peers and supervisors to support learning after the formal training has been delivered.
- Deliver learning in discrete bite-sized morsels, as opposed to setting aside multiple hours or days for learning.

Our authors lived up to the challenge of addressing Learning in the Moment with a variety of experiential learning activities (ELAs) and articles. The 2012 Pfeiffer Training Annual includes submissions in the facilitation, leadership, communication, coaching, and life/career planning categories. The 2012 Pfeiffer Consulting Annual includes Learning in the Moment submissions in problem-solving alternatives, team roles, leadership style, coaching, change management, personal growth, and interface with clients.

The Training Annual includes two ELAs you won’t want to miss. In Pair/Share, Lou Russell wastes no time getting into the training topic. Jan Schmuckler’s activity helps participants identify the relationships that have influenced them. Learning in the Moment occurs when this ELA is used by coaches and mentors. There are six articles relating to the theme. Homer Johnson and Anne Reilly present a 4R model that helps managers learn and maintain their skills on the job. Chris Hipple and Zane Berge present the opportunities and risks of incorporating user-created content in organizations. Brittany Ashby reminds us of the Socratic Method to teach employees to think. Gary Wise’s article addresses the theme, but also is a cutting-edge topic that examines the urgency to reinvent training organizations. Jim Gary and Michele Summers discuss creating a playbook for delivering successful results for hazardous oversight programs, an area in which Learning in the Moment can mean the difference between life and death.

This year we are also honored to have an article submitted by Dr. Donald Kirkpatrick. Don discusses the four levels of evaluation, relating how they came about over fifty years ago. You will be excited to read how evaluation fits with our theme, identifying more than a dozen ways to evaluate learning in the moment. We are grateful that Don took time to share this contribution with us.
The Consulting Annual includes four ELAs on the theme topic. Karen Dietz and Lori Silverman demonstrate the use of storytelling to solve immediate problems. Linda Bedinger and Charlotte Waisman show us how teams can explore roles and qualities in short order. Diane Hamilton’s ELA helps people define a vision of leadership and assess their own strengths and needs immediately. Antoine Gerschel and Lawrence Polsky have participants up on their feet practicing one-minute change messages. The Consulting Annual also includes five Learning in the Moment articles. Travis Russ explains how to conduct a 360 to gain in-the-moment feedback. Jean Lamkin is with us again to ensure that we all use coaching assessments for maximum and immediate learning. Linda Raudenbush relates a successful team-building experience that can easily be transferred to your situations. Leonard Goodstein discusses how executives learn in the moment through coaching practices. Mohandas Nair discusses a continuous process for developing managerial skills. Deborah Thomas is our editor’s choice; she connects corporate values to learning, as learning occurs.

What Are the Annuals?

The Annual series consists of practical materials written for trainers, consultants, facilitators, and performance-improvement technologists. We know the materials are practical, because they are written by the same practitioners that use the materials.

The Pfeiffer Annual: Training focuses on skill building and knowledge enhancement and also includes articles that enhance the skills and professional development of trainers. The Pfeiffer Annual: Consulting focuses on intervention techniques and organizational systems. It also includes skill building for the professional consultant. You can read more about the differences between the two volumes in the section that follows this preface, “The Difference Between Training and Consulting: Which Annual to Use.”

The Annuals have been an inspirational source for experiential learning activities, resource for instruments, and reference for cutting-edge thinking for forty years. Whether you are a trainer, a consultant, a facilitator, or a bit of each, you will find tools and resources that provide you with the basics and challenge (and we hope inspire) you to use new techniques and models.

Annual Loyalty

The Pfeiffer Annual series has many loyal subscribers. There are several reasons for this loyalty. In addition to the wide variety of topics and implementation levels, the Annuals provide materials that are applicable to varying circumstances. You
will find instruments for individuals, teams, and organizations; experiential learning activities to round out workshops, team building, or consulting assignments; ideas and contemporary solutions for managing human capital; and articles that increase your own knowledge base, to use as reference materials in your writing, or as a source of ideas for your training or consulting assignments.

Many of our readers have been loyal customers for decades. If you are one of them, we thank you. And we encourage each of you to give back to the profession by submitting a sample of your work to share with your colleagues.

Just as our theme this year is Learning in the Moment, the Annuals are Ready in the Moment. The Annuals’ success is primarily due to the fact that they are immediately ready to use. All of the materials may be duplicated for educational and training purposes. If you need to adapt or modify the materials to tailor them for your audience’s needs, go right ahead. We only request that the credit statement found on the copyright page (and on each reproducible page) be retained on all copies. Our liberal copyright policy makes it easy and fast for you to use the materials to do your job. However, if you intend to reproduce the materials in publications for sale or if you wish to reproduce more than one hundred copies of any one item, please contact us for prior written permission.

If you are a new Annual user, welcome! If you like what you see in the 2012 edition, you may want to consider subscribing to a standing order. By doing so, you are guaranteed to receive your copy each year straight off the press and receive a discount off the cover price. And if you want to go back and have the entire series for your use, then the Pfeiffer Library—which contains content from the very first edition through the 2007 Annuals—is available on CD-ROM. You can find information on the Pfeiffer Library at www.pfeiffer.com.

I often refer to many of my Annuals from the 1980s. They include several classic activities that have become a mainstay in my team-building and strategic planning designs. But most of all, the Annuals have been a valuable resource for forty years because the materials come from professionals like you who work in the field as trainers, consultants, facilitators, educators, and performance-improvement technologists, whose contributions have been tried and perfected in real-life settings with actual participants and clients to meet real-world needs.

To this end, we encourage you to submit materials to be considered for publication. We are interested in receiving experiential learning activities; inventories, questionnaires, and surveys; and articles and discussion resources. Contact the Pfeiffer Editorial Department at the address listed on the copyright page for copies of our guidelines for contributors or contact me directly at Box 8249, Norfolk, VA 23503, or by email at pfeifferannual@aol.com. We welcome your comments, ideas, and contributions.
Acknowledgments

Kathleen Dolan Davies, Marisa Kelley, Dawn Kilgore, Susan Rachmeler, Rebecca Taff: Every year you produce one of the most valuable resources in the industry, delivering value to our dedicated readers. We all owe you a debt of gratitude. Thank you to Lorraine Kohart, of ebb associates inc, who pokes, prods, and cajoles our authors into submitting the best for you, the readers. She keeps us all organized, provides submission information, compiles the Annuals’ content, keeps authors in the loop, and is the go-between with the editing team to ensure all the deadlines are met.

And the paramount thank you goes to our contributors, who continue to create new and exciting activities and materials so that trainers and consultants everywhere have fresh materials to deliver to their internal and external clients. I invite everyone who is reading this to join these prestigious professionals in our next Annual. We are always looking for new authors who have creative yet practical ideas to share with the rest of the profession.

Elaine Biech
Editor
September 2011
The Difference Between Training and Consulting

Which Annual to Use?

Two volumes of the Pfeiffer Annuals—training and consulting—are resources for two different but closely related professions. Each Annual serves as a collection of tools and support materials used by the professionals in their respective arenas. The volumes include activities, articles, and instruments used by individuals in the training and consulting fields. The training volume is written with the trainer in mind, and the consulting volume is written with the consultant in mind.

How can you differentiate between the two volumes? Let’s begin by defining each profession.

A trainer can be defined as anyone who is responsible for designing and delivering knowledge to adult learners and may include an internal HRD professional employed by an organization or an external practitioner who contracts with an organization to design and conduct training programs. Generally, the trainer is a subject-matter expert who is expected to transfer knowledge so that the trainee can know or do something new. A consultant is someone who provides unique assistance or advice (based on what the consultant knows or has experienced) to someone else, usually known as “the client.” The consultant may not necessarily be a subject-matter expert in all situations. Often the consultant is an expert at using specific tools to extract, coordinate, resolve, organize, expedite, or implement an organizational situation.

The lines between the consulting and training professions have blurred in the past few years. First, the names and titles have blurred. For example, some external...
trainers call themselves “training consultants” as a way of distinguishing themselves from internal trainers. Some organizations now have internal consultants who usually reside in the training department. Second, the roles have blurred. While a consultant has always been expected to deliver measurable results, now trainers are expected to do so as well. Both are expected to improve performance; both are expected to contribute to the bottom line. Facilitation was at one time thought to be a consultant skill; today trainers are expected to use facilitation skills to train. Training one-on-one was a trainer skill; today consultants train executives one-on-one and call it “coaching.” The introduction of the “performance technologist,” whose role is one of combined trainer and consultant, is a perfect example of a new profession that has evolved due to the need for trainers to use more “consulting” techniques in their work. The “performance consultant” is a new role supported by the American Society for Training and Development (ASTD). ASTD has shifted its focus from training to performance improvement.

As you can see, the roles and goals of training and consulting are not nearly as specific as they once may have been. However, when you step back and examine the two professions from a big-picture perspective, you can more easily differentiate between the two. Maintaining a big-picture focus will also help you determine which Pfeiffer Annual to turn to as your first resource.

Both volumes cover the same general topics: communication, teamwork, problem solving, and leadership. However, depending on your requirement and purpose—a training or consulting need—you will use each in different situations. You will select the Annual based on how you will interact with the topic, not on what the topic might be. Let's take a topic such as teamwork, for example. If you are searching for a lecturette that teaches the advantages of teamwork, a workshop activity that demonstrates the skill of making decisions in a team, or a handout that discusses team stages, look to the Training Annual. On the other hand, if you are conducting a team-building session for a dysfunctional team, helping to form a new team, or trying to understand the dynamics of an executive team, you will look to the Consulting Annual.

The Training Annual

The materials in the Training volume focus on skill building and knowledge enhancement as well as on the professional development of trainers. They generally focus on controlled events: a training program, a conference presentation, a classroom setting. Look to the Training Annual to find ways to improve a training session for ten to one thousand people and anything else that falls in the human resource development category:
Specific experiential learning activities that can be built into a training program;

Techniques to improve training: debriefing exercises, conducting role plays, managing time;

Topical lecturettes;

Ideas to improve a boring training program;

Icebreakers and energizers for a training session;

Surveys that can be used in a classroom;

Ideas for moving an organization from training to performance; and

Ways to improve your skills as a trainer.

The Consulting Annual

The materials in the Consulting volume focus on intervention techniques and organizational systems as well as the professional development of consultants. They generally focus on “tools” that you can have available just in case: concepts about organizations and their development (or demise) and about more global situations. Look to the Consulting Annual to find ways to improve consulting activities from team building and executive coaching to organization development and strategic planning:

Skills for working with executives;

Techniques for solving problems, effecting change, and gathering data;

Team-building tools, techniques, and tactics;

Facilitation ideas and methods;

Processes to examine for improving an organization’s effectiveness;

Surveys that can be used organizationally; and

Ways to improve your effectiveness as a consultant.

Summary

Even though the professions and the work are closely related and at times interchangeable, there is a difference. Use the following table to help you determine which Annual you should scan first for help. Remember, however, there is some blending of the two and either Annual may have your answer. It depends . . .
When you get right down to it, we are all trainers and consultants. The skills may cross over. A great trainer is also a skilled consultant. And a great consultant is also a skilled trainer. The topics may be the same, but how you implement them may be vastly different. Which Annual to use? Remember to think about your purpose in terms of the big picture: consulting or training.

As you can see, we have both covered.
Introduction
to The 2012 Pfeiffer Annual: Training

The 2012 Pfeiffer Annual: Training is a collection of practical and useful materials for professionals in the broad area described as human resource development (HRD). The materials are written by and for professionals, including trainers, organization-development and organization-effectiveness consultants, performance-improvement technologists, facilitators, educators, instructional designers, and others.

Each Annual has three main sections: Experiential Learning Activities; Inventories, Questionnaires, and Surveys; and Articles and Discussion Resources. A fourth section, Editor's Choice, has been reserved for those unique contributions that do not fit neatly into one of the three main sections, but are valuable as identified by the editorial staff. Each published submission is classified in one of the following categories: Individual Development, Communication, Problem Solving, Groups, Teams, Consulting, Facilitating, Leadership, and Organizations. Within each category, pieces are further classified into logical subcategories, which are identified in the introductions to the three sections.

The Training Annual and the Consulting Annual for 2012 have a slightly different focus from past years. Both focus on the theme of Learning in the Moment, a topic that permeates our organizations and pervades all that we do as professionals in the learning and consulting arena.

The series continues to provide an opportunity for HRD professionals who wish to share their experiences, their viewpoints, and their processes with their colleagues. To that end, Pfeiffer publishes guidelines for potential authors. These guidelines are available from the Pfeiffer Editorial Department in San Francisco, California.
Materials are selected for the *Annuals* based on the quality of the ideas, applicability to real-world concerns, relevance to current HRD issues, clarity of presentation, and ability to enhance our readers’ professional development. In addition, we choose experiential learning activities that will create a high degree of enthusiasm among the participants and add enjoyment to the learning process. As in the past several years, the contents of each *Annual* span a wide range of subject matter, reflecting the range of interests of our readers.

Our contributor list includes a wide selection of experts in the field: in-house practitioners, consultants, and academically based professionals. A list of contributors to the *Annual* can be found at the end of the volume, including their names, affiliations, addresses, telephone numbers, email addresses, and, when available, websites. Readers will find this list useful if they wish to locate the authors of specific pieces for feedback, comments, or questions. Further information on each contributor is presented in a brief biographical sketch that appears at the conclusion of each article. We publish this information to encourage “networking,” which continues to be a valuable mainstay in the field of human resource development.

We are pleased with the high quality of material that is submitted for publication each year and often regret that we have page limitations. In addition, just as we cannot publish every manuscript we receive, you may find that not all published works are equally useful to you. Therefore, we encourage and invite ideas, materials, and suggestions that will help us to make subsequent *Annuals* as useful as possible to all of our readers.