

Job Instruction: Four Steps To Success

BY LEON GOLD

"Our store managers are caught in the middle. They're afraid their customers are being neglected when they take the time to train. But they also know that the customer can't be properly served unless they instruct their people. It's like renewing your driver's license or getting your car fixed. There's a natural tendency to put it off."

So confided John Haase, vice president for Abbey Medical/Abbey Rents, Inc., a large rental and sales chain. His comments reflected what other Human Resources Development (HRD) professionals report when discussing how job instruction is implemented in their organizations.

In the private sector, supervisors are generally under such intense profit accountability (often on a weekly or even daily basis) that instruction is frequently "back - burnered" indefinitely. They, and their organizations, assign it a lower priority than such pressing duties as scheduling, checking work, correcting mis-

takes and monitoring output. The latter seem to have a more direct bearing on profitability.

And in all organizations, supervisors can be easily intimidated by what they view as a somewhat alien chore compared to the more familiar tasks of fighting fires and getting out the work. After a few discouraging attempts, many conclude that they simply don't have the knack for teaching.

But teaching is a skill that *can* be learned. This article explores a straightforward, logical, clearly organized job instruction method that any supervisor can easily follow.

Ironically, supervisors who "don't have time to train" are usually kept busy handling problems that wouldn't have occurred if employees had been instructed properly in the first place. For the trainee, meanwhile, poor instruction can result in a sense of failure, possibly with negative attitudes toward the entire organization. And for the organization the consequences are numerous: grievances, accidents, customer complaints, increased waste, accom-

panied by lowered productivity and quality.

The Four Step Method

For the supervisor beleaguered with other responsibilities, the key to training efficiently and effectively is to use a proven job instruction approach. The four step job instruction training (JIT) method is probably the most widely-used and successful such process.

The JIT program was developed to meet the nation's unique production requirements during World War II. War-related industries were expanding rapidly. Inexperienced supervisors desperately needed a way to break in thousands of new employees, many of them women who had never before worked.

The government asked some of the country's leading educators for help. What emerged was the Four Step Method. The JIT system, revised in light of its years of use since the war, consists of the following steps: Prepare, Present, Try out, and Follow up.

This deceptively simple formula

Figure 1.
JIT INSTRUCTION/LEARNING SEQUENCE

BASICS OF INSTRUCTION	ESSENTIALS OF LEARNING
PREPARE	MOTIVATION
• Break down the job • Prepare an instruction plan • Put the learner at ease	
PRESENT	UNDERSTANDING
• Tell • Show • Demonstrate • Explain	
TRY OUT	PARTICIPATION
• Have the learner "talk through" the job. • Have the learner instruct the supervisor on how the job is done. • Let the learner do the job. • Provide feedback, both positive and negative. • Let the learner practice	
FOLLOW UP	APPLICATION
• Check progress frequently at first. • Tell the learner whom to go to for help. • Gradually taper off progress checks.	

succeeds because it relates the basics of instruction to the essentials of learning (see Figure 1). It compels the supervisor to structure training around:

- what motivates people to learn
- the learner's need to *understand*
- the importance of *participation* and feedback
- and how the *application* of knowledge completes the learning process.

Investigating this teaching/learning sequence step by step will reveal why it has proved to be such a vital tool for countless supervisors.

Get Ready to Instruct

JIT begins with preparing the trainee. But before this can happen, the *supervisor* must be primed to instruct.

The pre-condition for this readiness is recognizing that a situation exists requiring training. In the case of an incoming employee, this realization is usually obvious. And when new equipment or work methods are introduced, the organization typically sends out materials and a staff specialist or manufacturer's representative to

make the supervisor aware of an instruction situation.

But what about performance difficulties that supervisors face regularly? A comment by Mary Lou Olin, manager of Ground Services Training for Western Airlines, was echoed by other HRD practitioners: In nine problems out of 10, supervisors' immediate intuitive analysis is that "it's a training problem." But without actual *cues* they won't handle it as such. They won't adhere to the job instruction format they've been trained to follow.

Break Down the Job

Regardless of the circumstances calling for training, the supervisor's first task before meeting with the trainee is to prepare a written job breakdown. Here we confront a major resistance: "more paperwork." While some supervisors are willing to think through a job, few will commit their thoughts to writing. Many believe that "it's common sense." However, what's common sense to them may not appear to be the best work sequence or procedures for someone else, especially a new employee.

A good job breakdown covers every step of the operation, without shortcuts. This requires the supervisor to see it through the eyes of one who knows nothing about it. Preparing a job breakdown also provides the opportunity to highlight tricks or subtleties that might otherwise be forgotten. Figure 2 provides an excerpt from a job breakdown. Note how its style is concise, simple and easy to read.

Safety precautions are stressed right from the outset. This emphasizes that the safe way is the *only* way to do the job. If safety takes the form of an afterthought, the trainee may be tempted to cut corners under pressure.

Prepare an Instruction Plan

After determining the overall requirements of the job, the next step is to construct an instruction plan for *this* individual. Depending on their previous experience, some trainees may not need to re-hash certain skills or knowledge called for by the job.

Personnel records can be a good place to start in ascertaining where time can be saved. In data processing, for instance, the supervisor may be able to find out from records if someone is trained in a particular programming language.

But in other fields the supervisor will discover who needs what instruction only by talking with people or watching them work. The fact that a new employee has experience in customer relations does not indicate which specific tasks were performed or equipment used. Analogously, a restaurant manager will ask, "How do you clean *our* coffee machine?" Here, the trainee talks his or her way through this operation to verify that no further instruction is necessary.

Step 1. Prepare the Learner

Like the supervisor, the learner must be prepared for training. This preparation has two purposes — to put him or her at ease and to spark motivation.

Most people feel insecure and a bit strange in any unfamiliar

situation. A new job especially can arouse tension and even fear. The supervisor's task when first meeting the trainee is to overcome these learning-inhibiting factors by putting this person at ease.

How can this be accomplished? By letting the new worker know that nothing will be expected that can't be learned with reasonable effort; also, that questions will be permitted at any time. Most importantly, by conveying a sincere desire, not to judge, but to help the trainee succeed.

With the learner beginning to relax, the supervisor can start being concerned with motivational factors. Many supervisors overlook this step, assuming that new employees are eager to do well. Others believe that trainees are anxious to get into the job. But as Gary Peters, who trains restaurant managers for the Denny's chain, noted: "You get what you pay for. If you don't put in the time for motivating, you'll end up with high turnover."

"Motivating" doesn't mean manipulating or theorizing. Most trainees could care less what Maslow says. But they do want to know why this job is important to the organization.

Above all, they're interested in the personal rewards of catching on quickly. Effective supervisors recognize that what they responded to when they were beginners won't necessarily be meaningful to this trainee now. By empathizing with each individual learner, they understand that, as one trainer put it, "different buttons work for different people."

Financial advancement may often be the dominant concern. But in other cases the supervisor can appeal in varying degrees to the trainee's desire:

- to gain recognition and prestige
- to do the job better than the next person
- to be looked upon favorably by the boss and peers
- or simply to feel the pride of a job well done.

Step II. Present

Trainees are almost certain to become bored or frustrated if

they're expected to grasp difficult procedures or complex sequences too early in the instruction process. Realizing this, the supervisor teaches the job in small, digestible doses. This permits the learner to gain confidence by absorbing and applying instruction in increments.

The PRESENT step is composed of four activities — *tell, show, demonstrate and explain*.

• *Tell* — learning comes easiest when a brief overview of the entire job precedes detailed instruction in each operation. This run-through

follows the "Main Steps" column of the job breakdown. Some supervisors believe that they'll look stupid referring to a manual. But new employees will respect them less if they appear hesitant, become confused or forget certain key points.

• *Show* — by seeing as well as hearing, the trainee's learning is greatly multiplied. But it's not time yet to go into each element of the job at length. The purpose here is simply to communicate the rhythm of the entire operation and

Figure 2

PART I: AT START OF EACH SHIFT			
DEPARTMENT: <u>Hotel & Restaurant</u>		JOB BREAKDOWN	
JOB: <u>Press feeder</u>		Prepared by: <u>A. B. B. B.</u>	
Main Steps	Key Points	Tools, Equipment & Materials	Safety Factors
1. Check level of fountain solution & fill if necessary.	1. Check fountain solution level. Do not overfill. Check minimum and maximum capacities.	1. All solutions kept in metal bins. Store solutions.	1. Do not spin on walkway. Spin in bucket.
2. Check level of fountain in wet room. Check if needed.	2. Check job card for type of material being used. Check proper viscosity and thinner for solution.	2. Same as #1.	2. These materials are highly volatile and inflammable.
3. Wash sponges, bucket and gun regularly.	3. Use same thinner as in #2, above.	3. Same as #1.	3. Do not wash in closed sink. Sinks can cause nausea & unconsciousness.
PART II: TO START A NEW BUNDLE INTO THE PRESS			
1. Repeat left down to bring over new bundle.	1. Do not wait until bundle is pressed out all the way.	1. Leather padded gloves.	1. Always wear gloves when handling sheets to prevent hand cuts.
2. Check new bundle to be sure it is right one and in good condition.	2. Pull the job ticket & check order number. Place top sheet and sides and corners of bundle.	2. Leather padded gloves.	2. Always wear gloves when handling sheets to prevent hand cuts.
PART III: WHENEVER PRESS IS STOPPED			
1. Lower elevator with bundle on it & cover it with master sheet.	1. Lower only until top of bundle is at a convenient height.	1. Leather padded gloves.	1. Wear gloves to handle water.
2. Under observation, no contact by press man with plate on first unit.	2. Be sure entire plate is set. Dry spots can dry and damage plate.	2. Use sponge and clean water.	2. Be sure press is clean before passing it to wet bath plate.
PART IV: TO MAKE A JOB CHANGE			
1. Pressman stops the press.	1. Do not delay. Dry with an sponge and be damaged.	1. Gum in deep under recent catwalk.	1. Remove from pocket all objects (tools, pens, etc.) which could drop into press.
2. Turn up plate immediately.	2. Follow pressman's instructions exactly.	2. Same as #3.	2. Never bring rollers on chain bearings; they are damaged easily.
3. Under pressman's direction, take rollers down rollers and place in dampener washing machine.	3. Same as #3.	3. Same as #3.	3. Same as #3.
4. Under pressman's direction, take rollers out dust rollers.	4. Same as #3.	4. Same as #3.	4. Same as #3.
5. Empty ink from roller.	5. Pressman's instructions.	5. Same as #3.	5. Same as #3.

how each step leads to the next one.

• **Demonstrate** — now the job is presented in detail, one step at a time. The actual sequence of activities may not be the ideal *learning* order. Generally the best place to start is with the largest whole unit that falls out of the job. This is preferably a relatively easy task that will build the trainee's self-confidence. Moving from the simple to the complex, or from the known to the unknown, gives the learner a feeling of progress.

The supervisor can frequently save valuable time by showing an example of the finished product that's desired. For instance, a typist had difficulty understanding the format specifications for a report until her boss showed her a properly typed report to use as a guide.

• **Explain** — while demonstrating the job, the instructor clarifies *why* it's done this way. Here, the "Key Points" and "Safety Factors" columns of the job breakdown are a handy reference.

Grasping the "why" behind a job gives it meaning. Merely knowing what to do and how to do it limits the learner to a robot-like comprehension. But with a broader understanding, the trainee will be more self-reliant, more skilled at taking initiative and improvising when problems arise. Also, Gary Peters from Denny's noted that without this appreciation, "People will try to take shortcuts. Broken people (accidents) and broken equipment will result."

Discussion is one means of checking and enriching understanding. To stimulate discussion, the supervisor pauses after each step and encourages questions. If there are none, then he or she can go ahead and ask some. A simple "Do you understand?" isn't enough. The best questions are more specifically phrased in terms of when, how, where, who, why, etc.

Step III. Try Out

We learn to do by doing. Only by participating fully can learners generate and test insights that will help them find ways to handle problems.

"Knowledge keeps no better than fish." So said the philosopher A.N. Whitehead. Translated, this advises the supervisor to let the learner apply instruction properly.

On their first attempt trainees talk their way through the operation. Gary Peters commented on this frequently ignored transition: "Trainees need a safe way to go from hearing and seeing to doing. Talking through the job in their own words provides this bridge."

The new person then shows how to do it. Here the supervisor poses as the learner and asks, "Can you show me what I'm supposed to do?"

What if the trainee slips up or forgets something? The supervisor intervenes and provides an opportunity for self-correction. Only if the learner is still lost does the supervisor re-instruct where necessary.

The point here is to avoid over-correcting or blaming too hastily. The most constructive attitude assumes that mistakes at this early

stage are at least as much the responsibility of the supervisor as the trainee. The JIT Program emphasized that if the learner hasn't learned, the instructor hasn't taught.

Corrections — and all feedback — should be precise enough for trainees to learn from their mistakes. This means offering guidance more explicit than "you've got to do better."

Practice makes perfect, but only when the new employee can sense if progress is being made. This is why targets are needed during instruction, as well as enough sub-objectives and feedback to give the learner a tangible sense of being on the right track.

The issue of targets and feedback during the TRY OUT step intrigues many HRD professionals. A trainer of computer programmers noted that in JIT sessions, "We tell supervisors the importance of giving trainees benchmarks. 'This is where I want you to be in six weeks,' for

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instance."

She also observed one of the advantages in her field: "The supervisor has the trainee write a simple program, and it'll either come back right or not. This gives instant feedback if instruction has taken hold."

In a restaurant chain, meanwhile, supervisors are urged to furnish feedback at the end of every training day. But these examples are the exception, not the rule. More typical is the remark by Western Airlines' Mary Lou Olin: "Our feedback to trainees is terrible. We have good job standards but no real *trainee* standards."

Most HRD specialists do agree on one of the major benefits of the JIT approach. By trying out the job and practicing it over and over, the learner lets the supervisor see immediately how successful instruction has been.

Step IV. Follow-Up

At this juncture, supervisors frequently conclude that learning

has been fully applied and training is finished. HRD experts point out that the FOLLOW UP as well as PREPARE steps are the most commonly ignored elements of JIT.

The new employee shouldn't totally fly solo yet. During the follow-up period the supervisor will want to check in often enough to evaluate progress and affirm a genuine interest in the learner's development. Trainees don't want to feel deserted. On the other hand, when bosses permit overly-dependent subordinates to manipulate them into constantly giving assistance, the ultimate goal of job instruction is defeated — namely, to develop self-reliant employees.

One way to strike this balance is to give trainees a copy of the job breakdown prepared earlier. By posting it at their work place, or including it in a workbook, this becomes a guide they can follow. When they hit a snag, they refer to it before calling for help.

Another way the supervisor can ease off the learner's dependency is to tell him or her whom to go to for help when the supervisor is unavailable. Also, to examine progress frequently at first and then to gradually taper off. Only when the supervisor resolves that the trainee can do the job with normal supervision is instruction completed.

Benefits of the Four Step Method

HRD practitioners agree almost unanimously that supervisors must be shown the long-term personal payoffs of the Four Step Method if they are to devote the time required to instruct. Most also concur that JIT sessions don't do as well as they could to convince supervisors of these benefits.

Nonetheless, the rewards are significant. Well-trained employees come up to standard quickly, making the supervisor's job easier. These people work more productively and stay longer.

Or, coming at it negatively, a supervisor who neglects instruction can expect a turnover problem. John Haase from Abbey Rents remarked, "Exit questionnaires frequently contain complaints that an employee lacked a sense of achievement due to the supervisor's tendency to put off job instruction." And the most persuasive negative inducement may be that supervisors who don't instruct correctly usually end up doing the work themselves.

For the trainee, meanwhile, good instruction boosts self-confidence and satisfaction, along with a positive attitude that will carry over to other parts of the job. The organization enjoys fewer mistakes and accidents, with less rework and lost time. And the customer receives a better product or service.

Job instruction is too crucial to leave to chance. By training supervisors in the Four Step Method, organizations can help ensure that this vital responsibility will be carried out as efficiently and professionally as possible.

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