

JOB INSTRUCTION

**Instructors Guide
Session 3**

SESSION 3 - INSTRUCTIONS

It is important to read this manual and have a clear understanding of the contents, prior to the start of training.

Before the session starts...

Be there 15 minutes ahead of time.

Have the following materials ready:

- Flip chart and "If the employee hasn't learned" chart
- One Planning Timetable Sheet for each trainee
- Blank Job Breakdown Sheets
- Checksheets for demonstration

Set up the training site:

- So it does not look like the typical classroom, arrange seats in a horseshoe
- Flip chart at front of room
- Have "If the employee hasn't learned" chart hanging up
- Whiteboard
- A whiteboard eraser
- Two different colors of markers

Remember: As the instructor, it is your responsibility for this session:

- a) To provide the right tools, equipment, and materials
- b) To set up the training site, making it ready for the trainees.
- c) Check that the two volunteers are also properly prepared.

A NOTE TO TRAINERS

This manual contains a complete outline for these training sessions. It is your guide on what to say, what to write, techniques you should demonstrate, and even important things that you should keep in mind throughout the training activities. The following will help you identify the various types of materials.

TITLE Each section and subsection is labeled with a title, in **CAPITALS**, for your reference.

TEXT The material should be presented in the order given to aid comprehension and speed progress. You may change the wording to suit the teaching situation - as long as you maintain the same general meaning.

[] Instructions inside square brackets are for you, the instructor. There are four kinds of instructions:

1. Areas where you should use your own words,
2. Gestures that aid comprehension,
3. Background factors for you to keep in mind, and
4. The order of presentation.



This icon indicates to write on the flipchart.



This icon indicates to use transparencies on overhead projector.

MATERIALS

MATERIALS TO BE DISTRIBUTED

1. Job Breakdown Sheets
2. Basic teaching pattern.
3. Checksheets for demonstration.
4. Planning Timetable Sheets.

MATERIALS TO HAVE ON HAND

1. Job Breakdown Sheets.
2. Basic teaching patterns.
3. Checksheets for demonstration.
4. Planning Timetable Sheets.
5. Flip chart.
6. "If the employee hasn't learned" chart.

GENERAL OUTLINE

<u>Activity</u>		<u>Time Allotted</u>
Introduction Review of second session	Sub Total	10 minutes
Introduction to Planning Timetables Example of Planning Timetables	Sub Total	30 minutes
Filling in Planning Timetables Practice in filling out the Planning Timetable Sheets	Sub Total	10 minutes
Demonstration by Volunteer Procedure and filling out the Observation Checksheets Demonstration with Critique	Sub Total	25 minutes
Basic Teaching Pattern Emphasis on Steps 2 and 3	Sub Total	5 minutes
Demonstration by Volunteer Demonstration with Critique	Sub Total	25 minutes
Practice Analyzing Job Practice breaking down the Job Review of how to Prepare and Teach	Sub Total	10 minutes
Wrap Up Review of session 3 and preview of session 4	Sub Total	5 minutes
	Total	120 Minutes

LEARNING OBJECTIVES

After this session, the trainees will be able to:

1. Learn how to prepare a Planning Timetable for basic job instruction;
2. Improve their training abilities by practicing the four-step approach;
3. Gain a clear understanding of the basic teaching pattern.

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3-4	Demonstration by Volunteer	a. Procedure and filling out the Observation Checksheets. b. Demonstration followed by volunteers critique.
3-5	Basic Teaching Pattern.	Emphasis on Steps 2 and 3.
3-6	Demonstration by Volunteer.	Demonstration followed by volunteers critique.
3-7	Practice Analyzing Job.	a. Practice breaking down the jobs presented by the two volunteers. b. Review of how to prepare and how to teach.
3-8	Wrap-Up	Review of session and preview of next.

3-1 OPENING

[Thank everyone for attending].

Discuss

Today marks the midpoint in this program. Let's briefly review what we have covered so far.

- First we noted that it was not enough to simply describe or demonstrate how the job was done.
- Effective teaching can be divided into four distinct steps.

Ask

Question: Who can tell me what the four main JI steps are?

Direct

[Have participants read from their cards - (Job Instruction Card.)]

Read

A key element that we haven't covered yet is preparing the timetable.

Ask

Question: In terms of preparation what is the most important thing to accomplish?

Answer: Properly breaking down the job in advance in order to prepare.
[Wait for proper answer.]

Ask**Question: Why is this so important?**

Answer: If you have analyzed the job, it is that much easier to teach it clearly and in the proper order.

Direct

Let's look at your Job Instruction Card cards.

[Have trainees read and review the card]

Ask**Question: Which is probably most critical to achieving ultimate success?**

Answer: You must check and recheck until you know positively that the employee has understood.

Ask**Question: How do we check to see if the employ is really learning?**

Answer: The four check points in Step 3.

Question: What are the points under follow-up?

[Have trainees read aloud bullets from Step 4.]

Read

Everyone, at some time or other, forgets misunderstands, or slips up. This is why it is necessary to provide follow-ups for every job taught until the employee has mastered the job.

All the items listed on this card are essential. None of them can be omitted nor can they be rearranged. If you observe them diligently, the employee is guaranteed to learn. I know you are busy, yet nobody is too busy to teach properly. Remember our motto:

Direct

Point to:

“If the employee hasn’t learned, the instructor hasn’t taught.”

3-2 INTRODUCTION TO PLANNING TIMETABLES

Read

During our conversation in Pre-Instruction yesterday I mentioned creating a Planning Timetable. Before you can begin practical instruction you must determine the training requirements for your section.

Many of you are already systematic in conducting your daily affairs, so why not be systematic when training others?

Question: Why would you need to prepare a Planning Timetable?

Answer: So that the training can be done by plan and need and not reactively or by accident.

Question: What should a Planning Timetable show us?

Answer: A Planning Timetable should show us three things:

- Who should be trained?
- In which job?
- By what date?

Read

A planning schedule or timetable is the answer. Here is a quick and easy way to make it.

As an example, I will show you how a supervisor in the inspection line made out a training plan for his department.

I will build up an example of a Planning Timetable as made by this person. We will concentrate on the supervisor's method. So consider the method and not the details of the example. Later we will discuss how the Planning Timetable can be used on any type of job and at all levels of management.

Now for our example. I shall give each of you a blank form. Will you please copy the details?

Distribute

[Distribute the sample Planning Timetable; read and fill in the information.]

NOTE: Create your own custom example in advance of the class. What follows is only a rough example

The team leader's name is Chris Jones. He is in charge of several team members on the Finish line. Chris' objective in making a Planning Timetable is to illustrate the training that needs to be done and allow work to be done on time.

Chris took a piece of paper and prepared the outline of the form you have just received. To identify the sheet, he put his name, department, and the date in the top left hand corner.

**Write**

NAME: Chris Jones

DEPT: TEAM: 1st Shift
Finish

DATE: 07/21/04

**Write**

Next, he listed the various jobs done on his line across the top of the sheet.

**Write**

Next, he listed the name of his team members down the left side.

Read

Chris now considered what was the ideal capacity for each of the jobs for which he was responsible. This meant he had to decide the ideal number of people capable of doing the jobs satisfactorily - allowing for rush periods, sudden team member shortages due to absences, and any other team member emergencies. He considered each job in turn, making allowance for any special jobs and periods which he knew from experience may create difficulties.

Then he considered the capabilities of each person on the line.



Write

He indicated by a shaded circle, the jobs in which each was already capable of doing.

At this stage Chris obtained, in a very simple way, a complete picture of his line. He could see at a glance the strengths and weaknesses on any job, and just what each person was capable of doing. Such a chart was most valuable, but now let me show you how he converted it into a Planning Timetable.

His next step was to identify just what training was needed to get work done on time. First he considered his **PEOPLE** - anything that might happen to his team members which might disorganize the line. He looked for possible team member changes such as: anyone leaving, newcomers, promotions, transfers, vacations, and so on, and who would be replacements for them, either temporary or permanent. This reminded him that Wendy was a new job on December 14.



Write

He made a note of the date in the “remarks” column alongside Wendy’s name

Read

Next he considered the **PERFORMANCE** standard of his people. He considered responsibility to quality standards, safety and use of equipment and any other aspects which may be applicable. Was anyone responsible for: defective product, inferior work, injuries, damage to equipment, improper attitudes to other teams or members and so on?

For example, he knew that Danny was having difficulty with his work on the final test of a completed mirror. This caused him to be below the desired standard.

**Write**

He noted the inadequate skills - further training - against Danny's name in the "remarks" column of the timetable.

Finally, he reviewed whether he was meeting the **PRODUCTION** commitments of his line from two angles: 1) How he was meeting present requirements; and 2) what was needed in the future.

For this he reviewed each job heading. The position was satisfactory regarding present requirements, yet he had been advised of a new test connected with the final test which would mean a rush of work in two weeks time.



Write

Extra help would be needed on the final test by December 1st. This is noted by an asterisk under the final test column.

By reviewing the chart in this way...



Review

- People
- Performance
- Production

Chris easily recognized his immediate training needs.

His next job was to **plan** to meet them. He had to decide: **Who** should be trained, in **which** job, and by **what** date or time? Chris decided that to meet the coming pressure in December he would complete Tom King's training on the job. He set November 23rd as a target date by which this training could be completed. This meant that he had four days in which Tom could gain experience and become skilled in his new job before the rush of work began.

Danny's performance on final check was not up to standard and required immediate attention. Additional training was needed and Chris decided that this should be given by November 18th.

Wendy's job rotation also meant that the column relating to ideal capacities had to be checked. Chris found that he was covered satisfactorily in all jobs except for the weakness left on the final test line after job the rotation. Chris elected George to fill the gap and arranged to have him fully trained by the 10th of December.



Review

You can now see how Chris planned training so as to meet his production requirements.

Read

Your situations will probably be entirely different from this finish line example, so let's review the method of making a Planning Timetable. First, draw up your sheet and identify it by: name, department, date. Then list the headings to suit your needs. Notice I said "to suit your needs." Chris was concerned with getting through the work in his final assembly line, so these jobs were his needs. The idea of the Planning Timetable can be adapted to different situations. For instance, if a variety of jobs are done in your department, you can follow Chris's example. On the other hand, if you are concerned with people who all do the same

kind of job, the headings may be types of machines, or levels of skills. In some cases, the headings will be skills; for instance: measuring, sawing, planing, reading drawings, hanging doors, etc. These are skills which a carpenter might use on many different jobs.

3-3 FILLING IN PLANNING TIMETABLES

Read

Now list the names of your team members or people you are considering. When you have determined your job headings, establish their ideal capacities. The ideal number of people needed to carry out the work satisfactorily. This number is shown under each column. Indicate the jobs they are already capable of doing by shaded circles or any other means.

Then consider under three headings the things likely to give you trouble. Consider first, **PEOPLE**.

- Who is transferring
- Who is new?
- Who needs cross training?
- Other?

Next, consider **PERFORMANCE**. How does the supervisor establish performance standards? How do they locate poor performance areas? They do this by asking themselves , “Is this person performing this job up to the high standard I require? Yes or No.”

In considering this heading of “Performance”, they may have to analyze it into units. (This will be discussed later.) Such as:

- Time delays
- Quality issues
- Other

Then considering **PRODUCTION**, present and future. Remember that “production” is the work done.

Enter remarks on production change as appropriate at the bottom of page:

- Program changes
- Process changes
- Production increases
- Seasonal factors

In this way, what is called the “Three P’s” method - **PEOPLE / PERFORMANCE / PRODUCTION** - training needs are identified and noted.

So far we have analyzed the position, now we must decide what to do. We must plan now to meet our training needs. We must consider questions like: How can we cover key jobs for emergencies? The ideal capacity is always a useful guide. How can we make the best use of each person’s ability? When must training be completed? (Allowing time for doing the job)

Then we must decide:

- Who should be trained?
- For which job?
- By what date?
- So the work of our department will be done on time.

Making this decision and acting on it is just as important as the analysis.

Ask

Question: Are there any questions at this stage?

Read

Training is a critical responsibility of a team leader. As a group, team leaders/team trainers have to share in that responsibility. Remember, Planning Timetables are easy to make. They can be kept up-to-date quickly and easily by noting changes

that are coming, then we can prevent problems from arising by giving the needed instruction. Also, that can be very useful when taking over an area.

Production - getting work done on time - depends on planning. So does training, which is a vital part of production. People must know their jobs before they can produce. The training we are dealing with here is the training that must be done anyway to get work done on time. Whatever you do, don't be content with statements like, "It takes time", or "In how short a time can training be done effectively?"

As I have said, your areas may be quite different from an assembly line, yet the method is the same. I would like for each of you to make a sample training schedule to try out this idea. We want you to make real decisions on this training schedule. If you need any help to get started, I will give it gladly. Here are some blank forms. I will give you 15 minutes to work on these.

Distribute

[Give the trainees some time to work on the forms and answer any questions along the way as needed.]

3-4 DEMONSTRATION BY VOLUNTEER

Read

First, let me explain how we are going to conduct today's demonstrations. The volunteer will come to the front, set out the tools and materials needed for their demonstration, and then prepare to start.

Before the volunteers give their demonstrations. I will look over the job breakdown sheet which you have prepared. I will immediately give them back to you so that you can refer to them, if necessary, while you give your demonstrations.

Before you start, I would like you to describe briefly the job setting - who you are and who you are teaching. Tell us: Is the employee new? Or are they experienced, but have to learn a new job because they have been rotated or have come to help out? Fill us in on the essential details before your begin. Remember, the demonstration must follow your job breakdown and use the Four-Step Approach.

These demonstrations will, of course, require a volunteer to act as the employee. Please volunteer for the job that you do not already know after you hear the background information.

As you watch the demonstration, check the progress against the steps listed on your Job Instruction cards. I will now pass out observation checksheets, which you can fill out as you watch the demonstration.

Distribute

[Give two checksheets to each person.]

Read

As you listen to the initial explanation, fill in the job name as well as the names of the two volunteers participating in the demonstration. At Step 1, check each of the items listed on the card. At Step 2, list the Major Steps, Key Points, and Reasons as the Instructor gives them on the worksheet. At Step 3, check off the tryout steps you see. At Step 4, use the same procedure as for Step 1.

Read

At Step 2, remember to write not what you think the Major Steps and Key Points are, but what the person giving the demonstration says they are. If you notice that they have made a mistake or left out something important, make a note so that you can bring it up in the discussion which follows. If you do not understand the explanation or cannot write fast enough, concentrate on the demonstrations.

Now, _____ will give us the first demonstration.

(Allow 15 minutes per demonstration)

Note

- Ask the volunteer for the name of the job.
- Pick a volunteer to act as the worker/employee. As far as possible, choose someone who does not already

know the job. Choose someone from the opposite side of the room.

- Have one of the volunteers come to the front. Ask the instructor to set everything up for the demonstration.
- Clear the table, removing all manuals, paperwork, planners, etc.
- Review quickly the instructor's job breakdown sheet to see how many steps there are, etc.
- Take an Observation Checksheet and sit down. Fill it out for use in the subsequent discussion.
- Have the volunteer give the shop setting.

DEMONSTRATION

Note

When finished thank the volunteer and ask them to sit down. Tell the volunteer to take the tools and materials with them.]

Discuss

Now that we have all seen the demonstration, let's review it.

Note

[Be careful not to insert instructor's opinions; just get class members ideas.]

Start with preparation:

- Had the instructor thoroughly analyzed the job?

- Had the instructor brought everything?
- Had the instructor arranged the site properly?

Note

Step 1 Discuss Step 1 errors and omissions briefly.

Step 2 There are seven basic questions below that you may ask. Questions 1, 2, 3, 4 and 6 (marked w/asterisks) should always be asked. The others may be omitted if the volunteer has performed satisfactorily.

1. Did the instructor clearly separate the major steps?
2. Did they mix steps and key points?
3. Did they provide a key point for each major step?
4. Did they mix key points and reasons?
5. Did they backtrack, mentioning new key points at Step 3 when they were giving the reasons?
6. Did they provide a reason for each key point?
7. Did they get worker to ask questions?

Summarize

Step 3 Review the four checkpoints: How did they check understanding? Which checkpoints did they skip?

Summarize

Complete the 2nd demonstration.
Discussion following above guidelines.

Step 4 Discuss Step 4 overall performance briefly.

Summarize

Complete the 2nd demonstration of
Discussion following the guidelines.

3-5 BASIC TEACHING PATTERN

[Refer to Job Breakdown Sheet (Appendix 1) and Basic Teaching Pattern (TP 3-2).]

Read

The first step is demonstrating the new job. The first time through, you merely describe the procedure as you go. In other words, you read the contents of the left hand column of the Job Breakdown Sheet. The second time through, you give the Key Points, listed in the column to the right. The third time, you give the Reasons for each of the Key Points on the sheet. Finally, the only thing left to do is make sure that the employee asks you for clarification on the points they did not understand.

The next step involves the employee practicing the job four times. The first time, you merely watch, correcting as needed. The second time, you have the

employee list the Major Steps as they go along. Here you check to make sure that they do not miss any of the Major Steps listed on the Job Breakdown Sheet. The third time, you have the trainee list the Key Points as they go along. Here you check to make sure that they do not miss any of the Key Points listed on the Job Breakdown Sheet. The fourth time, you have the employee give the Reasons for the Key Points. Here you check to make sure that they give a Reason for each Key Point on the Job Breakdown Sheet.

You must therefore check four levels: Motions, Major Steps, Key Points, and Reasons. As a group, these are called the Four Checkpoints. These four checkpoints, along with the three trainer demonstrations that precede them, form the basic teaching pattern, the foundation of effective teaching.

3-6 DEMONSTRATION BY VOLUNTEER

Repeat demonstration and discussion as in 3-4.

3-7 PRACTICE ANALYZING JOB

NOTES

Note: Normally here if time allows you should practice analyzing the job that was just demonstrated and how to breakdown the major steps, key points, and reasons why. If time does not exist, the presentation by the volunteer went well, or there are many others that need to present then this section can be skipped.

Read

Now let us practice preparing a Job Breakdown. (previous demonstrator) _____, please come back up to the front. Bring your tools and materials. Bring your own Job Breakdown Sheet so that you can write on the back.

Distribute

[Hand out Job Breakdown Sheets.]

Read

I would like you to watch how we determine the Major Steps and the Key Points. When we have found one, write it down on your sheets.

Direct

[Direct the following questions and statements to the volunteer.]

First, you enter the name of the job you are about to teach.



[Write the name of the operation demonstrated on the flipchart for the others to copy.]

Read

Next, you enter the parts, the major items that you will be dealing with.



[Write the answers on the flipchart for the others to copy.]

Read

Finally, you enter the tools, and other materials required.



[Write the answers on the flipchart for the others to copy]

Read

With these preparations complete, we are now ready to fill in the two columns, giving the Major Steps - those necessary to the advancement of the job, and the Key Points - information that makes the job easier, safer, or more reliable

MAJOR STEPS

(Volunteer's name), please give it a try.

Direct

1. Have them do the job a step one a time.
2. Stop them when they have completed a major step.
3. Ask them what they have just done.
4. Ask if that advanced the job.
5. Ask them if it is a major step.
6. Ask the others if they agree.
7. Have the volunteer write the step on the back of his Job Breakdown Sheet.
8. Also write it on the board for the class.
9. Have the others write it on their sheets.
10. Return to Step 2 above, for the next step.

KEY POINTS

If the volunteer fails to spot a key point, prompt with questions; Why...? What if...? Once the volunteer has listed what they think are the key points, ask the class for ones that they might have missed. Let them decide whether the suggested ones qualify. Finally, have the volunteer compare this breakdown with the one they used in the original demonstration. When the volunteer has finished, have them sit down and take the tools and materials with them.]

REVIEW OF JOB INSTRUCTION CARD

[Have learners repeat: the Four Steps to Effective Teaching (both headings and items), and the motto. Do not follow the seating order. If there are any that have not reviewed the contents of the card, remind them that they have to learn them by the final session.]

3-8 WRAP-UP

Read

By now you should realize proper preparation and the four basic JI steps are critical for more effective teaching. Watching today's demonstrations and participating in the discussion which followed taught you what to look for when you have to teach. You have also seen

that the more carefully you prepare, the more effectively you can teach.

Since each of you will, at some time during the program, have to play a role of the student, you will also see Job Instruction from the learner's point of view as well.

Let's thank _____ and _____ for their demonstrations today. I thank all of you for your active participation in the discussion which followed.

Today we concentrated on the basic teaching pattern and the task of job analysis. Breaking down a job helps fix the order firmly in your mind. When it comes time to teach, simply following the four basic steps will enable you to instruct in a fashion more readily understood by the employee. As a side benefit, this breakdown technique can also be applied to the preparation of work standards.

[Select two volunteers - and a backup - for the next session. Tell them to bring their own sets of tools and materials. Close session promptly at the specified time.