

Richard Wood

Learning & Development Portfolio

Excerpts from **Interactive Training that Matters** and **Train to Retain**.



IFI | learning & development

Interactive Training that Matters

Accelerate Employee Development
with Purposeful, Engaging Training



IFI training

Turn every training moment into an opportunity for growth!

Design and deliver **training that transforms**. Whether you're coaching, mentoring, or conducting a workshop, this manual gives you the tools to build meaningful engagement that makes learning last. You will learn to:

- ⌘ Analyze your audience and adjust delivery to **increase learner engagement** and skill application.
- ⌘ Create interactive and tool-based learning experiences that **motivate action and inspire long-term development**.
- ⌘ Build stronger trainer-participant relationships that **support trust, retention, and growth**.
- ⌘ Apply IFI's Process Approach™ to structure learning in a way that leads to **consistent, measurable results**.
- ⌘ **Deliver content confidently** using visuals, exercises, and strategies that support different learning styles.

No matter your level of training experience, you can learn how to deliver learning moments that matter. This manual will guide you through proven instructional design principles, effective engagement techniques, and practical delivery methods that will help you teach and transform individuals, not just deliver training.

By mastering these approaches, you'll be equipped to create high-impact learning environments, elevate performance across your organization, and develop employees who grow with intention.

This manual is designed to accompany the course from IFI Training but can also be used as a stand-alone guide.

Principles of Communication

Effective communication is the foundation of successful relationships, both personal and professional. Communication facilitates understanding, ensures clarity and purpose, and creates opportunities to interact with others.

Communication should achieve its purpose across all forms:

- ☒ Written
- ☒ Spoken
- ☒ Interpersonal
- ☒ Meeting Management
- ☒ Virtual
- ☒ And others

Communication styles change. These Principles of Communication provide guidelines to communicate effectively, including some updated rules.

Effective communication consistently achieves the desired outcome!



“Pressure is on us by the nature of the job. Performance releases pressure”

– J.T. Fischer

IFI Training’s SCOPE



“SCOPE” has **five key principles**, which each have *two parts*.

SCOPE:

1. a range of view or action;
2. capacity for achievement; or
3. end in view, aim.

 Specific	Customized	Persuasive
 Clear	Brief	Understandable
 Organized	Primacy	Accessable
 Personality	Polished	Visual
 Efficient	Easier & Faster to Create	Easier & Faster to Process

“The only thing worse than being blind is having sight but no vision.”

– Helen Keller



Specific

Effective communication is specific to cut through the many demands people have on their attention.

Customized

Communication is customized when it is:

- ☒ **Congruent** with expectations
- ☒ **Focused** to your specific audience
- ☒ **Compelling** using reasoning that draws the audience in
- ☒ Clear using words, terms and acronyms that your audience knows
- ☒ Addressing **specific audience questions** and/or concerns

Customize your communication.

- ☒ Engage your audience.
- ☒ Reduce misunderstandings.
- ☒ Invite participation and ownership.
- ☒ Reduce misunderstanding.



Instructions

When have you seen **customized** communication work? Record your insights.

Persuasive

Persuasive communication supports your desired outcome using:

- ☒ **Believable** examples
- ☒ Well developed **solutions**
- ☒ Interesting, audience-focused **proof**
- ☒ Easy-to-follow **logic**
- ☒ **Conversational language**, including pronouns (I, we, you)
- ☒ **Positive tone**

Ultimately, all communication needs to persuade your audience to do or feel something.

 Instructions

When have you seen **persuasive** communication work? Record your insights.

Clear

Clear communication is approachable and straightforward. Clear communication encourages action. Sometimes that action is simply to believe you.



Brief

Effective communication uses no more information or length than is necessary. Use:

- ☑ **Short** words, **Short** sentences, **Short** paragraphs
- ☑ Few pages, Simple **visuals**
- ☑ **Clear concepts**
- ☑ The **concept of “Fives”**
 - » Audiences can only remember five or fewer concepts.
 - » Communication should be limited to five or fewer main points.
 - » Lists should be limited to five or fewer concepts.

 Instructions

When have you seen **brief** communication work? Record your insights.



Understandable

Good communication invites understanding from the audience with the responsibility for understanding on the communicator. Easy to understand communication:

- ☒ Uses **understandable words and phrases**
- ☒ Limits the amount of time spent in sustained lecture. The lecture is the least effective way to communicate.
- ☒ Uses headings, lists, and **short statements**.
- ☒ Reduces the number of multi-syllable words, technical jargon, and acronyms.
- ☒ Uses **natural repetition** to:
 - » **Enhance memory** of major points
 - » **Focus the audience** as well as the communicator
 - » **Increase retention**

Understandable communication is not only good for the audience but also great for the communicator.



Instructions

When have you seen **understandable** communication work? Record your insights.

Deny the audience the right to misunderstand!



Organized

Organized communication is easier to understand and easier to remember.

Primacy

In today's busy work world, effective communication lets people **know up front** why they should be involved in the process.

- ☒ Begin with the **purpose, action item and recommendation**.
- ☒ Tell the most important things **in the beginning** of the communication.
- ☒ In each point, lead with your most important support.
- ☒ Reduce the use of introductory phrases.

An effective hierarchy always **prioritizes information**. Business audiences don't have time to search for key information.

Accessible

Help your audience find the information they need to be able to act on what they learn from you.

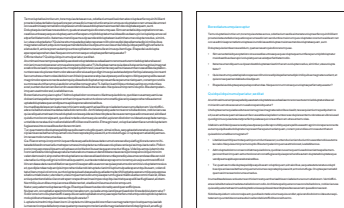
- ☒ **Skim & Scan** – allow your audience to find the information they need by skimming and scanning for the important concepts.
- ☒ Use a **set up** and **purpose statement** in the beginning to let the audience know why you are presenting and what they can expect.
- ☒ Use **signposts** and **transition** words to tell the audience where they are in the presentation and to introduce major concepts.
- ☒ Use a **variety of visuals**.



Instructions

When have you seen **prioritized** communication work? Record your insights.

What would you rather look at?



Instructions

When have you seen **accessible** communication work? Record your insights.



Personality

As with any relationship, good personality **makes connection easier** and more likely. While this principle isn't universally understood, it is part of the secret sauce of effective communication.

Polished

Clients expect clarity and polish in your communication with them. Add polish and personality to your interactions with:

- ☐ Proper word usage, **spelling** and form
- ☐ Visuals that communicate clearly
- ☐ **Polished** look and feel
- ☐ Quality presentation (**color**, binding, customization)
- ☐ Purposeful communication.

Polish builds trust. Polish is the difference between being *decent* and being truly *professional*.



Instructions

When have you seen **polished** communication work? Record your insights.

Communication is most effective when expectations are met or exceeded!

Visual

Every organization and person likes communication that is visual. Visual communication is characterized by:

- ☐ Documents and presentations that look and feel **inviting** and worth the time
- ☐ **White space** on each chart; time (silence) during the presentation
- ☐ **Variety** in page layouts

- ☑ Easy to understand visuals limited to 6 **or fewer factoids**
- ☑ Effective headings that communicate

Images and **good design** are important in communicating thoughts and ideas. Words can also be visual. The new definition for a visual is *anything that is not a paragraph*.



Instructions

When have you seen **visual** communication work? Record your insights.

Efficient

The best communication is efficient and effective from the perspective of both the presenter and the audience.



Easier/Faster to Create

In today's busy work world, professionals need to create and prepare for communication **quickly** and effectively:

- ☑ Use the **4mat™** organizational tool
- ☑ Separate the create and edit processes
- ☑ Make use of **small blocks of time**
- ☑ Speak to the experience level of your audience

Time is money. Make time to develop effective skills to update and improve your communication skills.



Instructions

When have you been able to **create** effective communication **quickly**? Record your insights.



Easier/Faster to Process

Just as the writer and presenter need to prepare quickly and effectively, the audience needs to be able to quickly and easily process the information they receive. Audience friendly communication:

- ☒ Is **audience focused**
 - » Uses audience-friendly **voice and tone**
 - » Meets audience needs
- ☒ Has clear, easy to find action items
- ☒ Previews key content
- ☒ Uses **emphatic devices** to make content easy to understand

Speeding up the ease of processing information will make your audience more open to your message and much more likely to trust you with their time in the future.



Instructions

When have you seen communication that's **easy to process**? Record your insights.

Train to Retain

How to Build Internal Mobility
Through Effective Learning

Richard Wood

Prepared for



Things Worth Remembering

Things Worth Remembering

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

IFI training 801-373-4664 info@ifitraining.com



You're hired!

Meridian Manufacturing



Today's Session

01

**Train for the
next role**

02

**Make managers
part of the
system**

03

**Measure
what Matters**

01

Train for the Next Role



The 2026 Shift

From course completion
to speed to proficiency.

01 - Train for the Next Role

Design the Next-Role Training Plan

Pick ONE candidate at your table. In 7 minutes, answer:

1. What two skills or experiences are missing for the next role?
2. What does a training plan for the next role look like?
3. What's ONE thing it should NOT include?

Learning & Development's Role

**Design for experience, not
deliver content.**

02

Make managers part of the system



60%

of high-potential employees say their immediate supervisor
is the primary obstacle to their internal mobility.

Source: HRTech Cube, 2026

02 - Make managers part of the system

What changes can HR make?

As a table. Take 2 minutes to brainstorm

- Incentives
- Policies
- Processes
- Visibility tools

What they don't know

- Telling is not teaching
- Modeling matters
- Assignments don't mean development
- Comfort isn't a sign of readiness
- Feedback is not the law
- Training is most valuable within workflow

Review

01

Design for the next role

Experiences with structure around them, not workshops or learning reports.

02

Make managers part of the system

Structural change AND conversation skill.

03

Report what your CFO measures

Eg. Internal fill rate. Retention of movers. Time-to-deploy. Cost avoided.

Our Client

NTSHRM Educational Luncheon • May 21, 2026



Precision aerospace components • Lewisville, Texas • Est. 1998

THE COMPANY

- 350 employees across three plants in North Texas.
- Manufactures precision aerospace components for defense and commercial customers.
- Annual revenue ~\$72M. 22% growth over the last three years.
- HR team of three: HR Director, HR Generalist, Recruiter.
- Training budget: \$180,000 annually (LMS subscription + occasional outside workshops).

THE NUMBERS

19%

Voluntary turnover
80% left for promotions

3

Internal candidates
Passed over in 6 mo.

?

Internal mobility rate
Never measured

THE PRESSURE

From the CFO: *"I keep approving training spend. We keep hiring externally for every supervisor role. What's the disconnect?"*

From the CEO: *"What's our internal mobility rate? Why don't we know it? The board is asking about our leadership pipeline."*

Turn over for the three candidates →

The Three Candidates

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Three internal candidates have been passed over for external hires in the last 12 months.
Two of the three are now in similar roles at competitors.



Maria Alvarez

Senior Production Coordinator • 6 years at Meridian

→ WANTS: Production Supervisor

Applied for Production Supervisor when the role opened; it went to an external hire with five years of supervisory experience. Maria has strong technical skills and is widely respected on the floor, but has never formally managed people. Currently leads process improvement projects informally with three of her recommendations now being standard practice. Wants to lead a team.

Devon Lee

Quality Tech II • 4 years at Meridian

→ WANTS: Quality Engineer

Applied for Quality Engineer; was told he "needs a degree." His work is consistently rated top-quartile and he's been teaching himself statistical process control on his own time. Built an internal tool that the QE team now uses daily. No bachelor's degree. Has started taking community college courses at night.

Georgia Shah

HR Generalist • 3 years at Meridian

→ WANTS: HR Manager

Applied for HR Manager when the prior manager left; the role went to an external hire. Georgia has run open enrollment, the wellness program rollout, and two policy rewrites. Wants to grow into HR strategy. Strong relationships across the org. Her current manager is the HR Director, who hired the external candidate over her.

Your Table's Work

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Advisory Team #_____ Members: _____

LAB 01 • 10 MIN

Design the Next-Role Training Plan

Candidate chosen: ☐ Maria ☐ Devon ☐ Priya

1. Two skills or experiences the candidate is missing for the next role:

2. What the next-role training plan looks like (be specific):

3. ONE thing it should NOT include:

02 • 10 MIN

Fix the Manager Bottleneck

1. Structural change HR makes this quarter:

2. Conversation skill managers need to build (and how training teaches it):

3. Your one sentence to: "If I develop them, I lose them."

LAB 03 • 6 MIN

Build the One-Slide Dashboard

Sketch on a blank page. Headline number + 3-5 metrics + what GOOD looks like.

Cut on the dashed lines

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MY COMMITMENT

*Train to Retain • May 21, 2026***ONE** principle I'm taking back:

ONE conversation I'll have:

With whom: _____

By when: _____

Fold and keep. I'll follow up in 30 days. — Woody, IFI Training

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