Welcome to “How using storytelling techniques could lead to more effective training... and presentations.”

All right. Consider the situation. You have a skill... a knowledge base... a certain expertise that makes you good at what you do. And now, your company — or your client — wants you to teach others how to do what you already know well. It's flattering for a second and then, almost instantly, some mild form of panic sets in.

How do you present what you know? How do you structure the training? How do you keep the group's interest? And where do you start? For most of us, the search for these answers begins and ends with one question...
“What’s been done before?” And so, strong in our sense of tradition and habit, we open up a PowerPoint™ template, gather up our data, and rush back to the same methodology that’s been ingrained into us since elementary school. And what is that protocol? You probably remember it well.

“Topic sentence — support points — summation.” Or, to put it in the terminology of the business world: “Tell them what you're going to tell them. Tell them again. And tell them what you told them.” These guidelines are safe. They’re rooted in business and educational tradition. And if you’ve ever been on the receiving end of one of these presentations...

…you know they almost never hold your interest. The problem with that is not just that it's boring.
The much more critical issue is that a training session in which learners aren't paying attention cannot, by definition, produce effective behavior change. And really, that's the whole purpose of training: to teach people new behaviors they can use to improve performance.

So let's talk about that goal. According to ASTD -- the American Society of Training and Development -- and one of the worst acronym'd organizations in the known world -- this is the mission of training: to “empower professionals to develop knowledge and skills successfully.” That is a laudable goal. But it raises the question: how does one measure successful?

For the purposes of this presentation, we will define successful in terms of helping attendees achieve the following goal...

“To help participants achieve a level of performance in the targeted behavior that is better than their current performance.” This is the reason companies invest in training. After all, if the trainees were already performing at an acceptable level in the particular area, there would be no need to train them. And the firm's money could be better allocated elsewhere. But since the goal of training is to have learners improve upon the status quo, the task facing you, the trainer, is easy to express...but difficult to achieve.
The Challenge: How do you design training and presentations that result in learners doing better? And likewise, how you create a presentation that really resonates with your audience?

Peter Guber, author of “Tell to Win: Connect, Persuade, and Triumph with the Hidden Power of Story” says that “Especially in business, you've got to provide an emotionally propelled vehicle to communicate information to people.” Why should he know? As the studio chief of Columbia Pictures, chairman and CEO of Sony Pictures, and chairman and CEO of Mandalay Entertainment Group, Mr. Guber’s job has been to persuade investors and producers to invest millions of dollars in movie concepts long before a single frame is filmed.

In other words, he gets people to invest in things that don't exist yet. So maybe he knows something about persuasion. Guber also makes the point that a significant amount of research shows that most of us make our decisions in an emotional manner, but then find an intellectual alibi to justify them.
In short, emotions are stronger than logic. But if that's true -- why are most educational and business presentations so devoid of emotion?

Guber’s theory is that our schools and workplaces, by their very nature, oppose emotion. His point: our culture has a “dominant assumption that hard business decisions are governed exclusively by numbers, tactics, concepts, and raw data — hard stuff.”

It's been this way for a while. Philosophers since Plato have taught that emotions, or as he called them, “the passions” -- were unruly forces that we had to harness and suppress if we wanted to think clearly. Because reason is the supreme expression of “higher consciousness.” It didn't take long for educational systems to adopt this model.
And that was even though the oral tradition of “educating through stories” – shown here in this image representing “The Tales of Arabian Nights” -- dates back to long before the invention of written language.

Still, there is little question that the educational system we all grew up with puts a premium on intellectual reasoning at the expense of emotion. Now why do you think this is?

Write in your theory in the text box. We’ll see what different people have to say.

My personal theory is that this emotionless approach gained acceptance because when you take emotion out of any subject matter, it becomes less messy and unpredictable, and therefore…easier to control.

Or, as training guru Peter Drucker put it, “if it doesn’t get measured, it doesn’t get managed.” And of course, there's also that factor we talked about earlier – which is that most people tend to follow the path with which they're most familiar. And that brings us back to the way nearly all of us learned how to present back in school. You remember this…
In the classroom, it was abundantly clear that the students who received the highest grades for their reports were the ones who pleased the teacher by demonstrating how much they knew. But in training and presentations, that model of “showing that you did all your homework” is really pretty inappropriate. And that’s for good reason: In school, our work as students was graded by someone who knew more about the subject than we did — namely, the teacher.

But in training and presentations, we’re talking to people who know less than we do. And that is a 180 degree change. So the issue is not how much we as trainers know, it’s how much the audience, as people new to the information we’re bringing them, are able to take what they’re learning from us and apply it to their work. And that’s why we need a very different way to present instruction...

So is there a more effective way for trainers to move people to do things differently? Well, the point being made here today is that a goal of that nature falls squarely in the realm of storytelling.
Now, I have to provide a little word of warning here. There's a certain danger to using the word “storytelling” in a business and training context. Although its principles have been used throughout history to convey messages that move people to action, there's something about the word “story” that instantly brings to mind fanciful tales, dubious excuses, and making things up as you go along.

Who knows? It may even be worthwhile in the business world for storytelling to go by another name altogether... Perhaps one with a little less fantastical of a connotation, such as “envisioning” or “situation–based presentations.” But for now, we’re going to use the word storytelling.

Okay — so what is a story? First, let’s look at what they’re not. To quote Mr. Guber again: “Stories are not lists, decks, PowerPoints, flip charts, lectures, pleas, instructions, regulations, manifestoes, calculations, lesson plans, threats, statistics, evidence, orders or raw facts. Rather, stories have a unique power to move people's hearts, minds, feet and wallets in the storyteller's intended direction.”
Examples of this basic truth are countless. The Bible, no matter your religion, is not just a collection of Commandments. It’s a collection of stories that demonstrate how one should live.
When Dr. Martin Luther King changed our nation’s definition of civil rights, he didn’t use facts and figures. He shared a dream.
And when candidates run for office, the successful ones are usually the ones who tell their stories, and the stories of their constituents, more dramatically and empathetically than their opponents.

In short, information defines, but stories persuade. The goal of training is to persuade your audience to adopt new ways of doing things. But how can any of us tell a story if we don’t know how to create one? Well, it’s simpler than you think. And you’re going to see how to do it, right now.

Up on the screen, you see the conventional presentation model. Some presentations might have more support statements in the middle, but basically it’s that same technique we learned in junior high. Tell them what you are going to say, tell it to them with more detail, and then tell ‘em what you told ‘em. But that’s not a story. Here’s how you tell a story...
You set up the current situation for your main character... give that person a goal to reach... reveal the challenge to that goal... and then have your main character learn a new way of thinking and doing... so that he or she can triumph over whatever was challenging them... and ultimately achieve the stated goal.

That's it. It's that simple. I have just shown you exactly what you’re going to get out of the next 30 minutes. From this point forward, everything you hear will in some way be about this slide. So now that I’ve given away the ending, can we keep this interesting and intriguing? Let’s see how the story unfolds...

The storytelling model always begins with a situation that defines the status quo — how things are at the point the reader enters the story. For example, here are four classic movies: The Wizard of Oz, Star Wars, Casablanca, and Goodfellas.

Write in what you see as the opening situation in any one of these movies.

So what’s the current situation at the beginning of each of these movies? In The Wizard of Oz, Dorothy is in Kansas, dreaming of life over the rainbow. In Star Wars, young Luke Skywalker is on Tatooine, being watched over by Obi-Wan Kenobi. Casablanca — Rick is lurking sullenly in his cabaret, indifferent to the war. And in Goodfellas, Henry Hill is a young kid, enthralled by gangster life. So that’s the point where they all are going to grow from. Or, in the case of Goodfellas, the point from where the main character doesn’t really grow. And usually, that lack of change is the foundation of a tragedy.
Now how about applying this idea to training situations or a presentation? In these cases, the opening situation is the status where each learner is at - as it relates to the topic in which they're about to either receive instruction or learn something new. There are numerous ways that a trainer can get his or her learners to get in touch with their current situation.

These include:
- assessment tests
- learner self-evaluation questions or questionnaires
- a parallel example that profiles a fictional worker or student in the same situation
- a case study
- an internal or external report that describes the state the organization is in
- a customer complaint
- the market condition
- or a description of a relevant internal or market need for what you’re about to introduce.

Each of these examples helps your audience determine where they are now in relation to your subject matter.

What method of demonstrating the Current Situation is this presentation using? It’s mainly #2, Self Evaluation -- posing questions for the group to reflect on; and #8, Market Need – showing why the market is calling for a more effective method for delivering training and presentations.
One of the most important requirements of the current situation step is that the main character must be introduced. The job of the main character is to reflect the audience. To quote famed movie director Barry Levinson: “The hero of the story is the character who makes the hard decisions and actually feels meaningful change happen within himself.”

With that in mind, do you know who the hero of this presentation is? It's not me. It's you. You are the one who decided to attend this webinar, because you wanted to learn a possible new way to achieve the goal of delivering either more effective training or a better presentation. So that means the change that's going to happen here, hopefully, will be to you.

The same concept applies when you’re giving a presentation. But in that case, the main characters and heroes of your story will be your audience. They're the ones whose current situation needs to change; they're the ones who arrived on the scene with the promise of learning a new way to improve their status quo. But how will things be better for them if they actually do improve upon the way things are now? That's described in the next thrilling chapter of our storytelling sequence...
Step 2: Establish the goal.
As human beings we innately seek meaning. This isn’t just a philosophy. Scientific research supports this claim. For example, Doctors Travis Proulx and Stephen J Hine propose that “people naturally assemble mental representations of expected associations which organize their beliefs and perceptions. And that provides them with a general feeling that their lives make sense.”

So, if we inherently need to make sense of our environment, maybe that explains why it’s not helpful for us to view a cascade of bullet points on a screen— or why it’s difficult to follow a set of instructions without knowing what the end purpose is. This is where the storytelling format can help.

Because very shortly after the main character is introduced, that person encounters something they are yearning for — or striving to achieve. That’s the goal — the purpose that propels the story. So using our previous movie examples, let’s see if we can identify the goal of the main character in each of them.

Okay, your turn to participate. Type in what you think the goal is for the main character in any of these movies.

So let’s see what we’ve got. In the Wizard of Oz, Dorothy’s goal is simply to get back home. In Star Wars, Luke Skywalker wants to defeat Darth Vader. In Casablanca, Rick’s goal is to
find out why Ilsa left him at the train station. And in Goodfellas, Henry Hill is propelled by the desire to be a big-time gangster.

Notice that these are all very concrete goals that have a tangible, visible resolution. They are each metaphors for a philosophical idea, but they are not philosophical themselves. The point: goals must be demonstrable, quantifiable and provable. The audience needs evidence that the goal was either achieved or missed.

To know the goal of almost any story ask yourself this question... “What is the main character’s reason for being?” or “What is the main character obsessed with accomplishing?” It’s that simple.

And in training, it's simple, too. The goal you need to communicate — is the reason that the training session or presentation is being held. In short, it’s the thing that attendees should be better at when they leave the session. For that reason, it's very important that you make two things extremely clear to your audience from the outset:

One, you need to tell them how their work life will be better after they apply what they're learning to their jobs — or their lives, as the case may be.

And two, you need to explain how the overall
organization will be better after everyone applies what they're learning from you to their work.

This dual-pronged approach gives your audience something to aspire to. It presents the goal both in terms of “what's in it for me,” as well as in terms of the benefit to their overall community of coworkers. In other words, stating the goal and its benefits right at the beginning provides relevancy, purpose and meaning.

Another point: the goal should never be about “learning” or “gaining information.” It should be about what learners will do as a result of receiving that information. In short, goals are about actions – not thoughts.

Let’s put that idea to the test. Here are two questions about the training you’re taking part in right now with this presentation.

Number one – how will this webinar potentially make your work life better? And two, in what ways could it make your organization better?

*Type your answers into the answer block.*

Great. Your answers -- are the goals (and benefits) you’re aiming for.
Now it’s true that many professionals in the training industry refer to this goal-setting concept as “learning objectives.” There is a similarity, but true to form for business and educational communications, it lacks the emotional pull that a good story provides.

Learning objectives tell you what you’ll get done. Establishing the goal in a story tells you how your life will be better once that goal is achieved. Also, learning objectives are about gathering knowledge. Storytelling is about acquiring tools. We’ll get into that shortly.

But for right now, let’s set our focus on goals. Goals, as we’ve mentioned, create a sense of purpose and meaning.

And, along the same lines, stories help satisfy our innate quest for meaning. Why do I say innate? Because seeking out purpose and meaning in our lives is part of our natural makeup. There have actually been scientific experiments done on how stories help satisfy a basic human need for purpose.

For example, Drs. Arthur Graesser, Murray Singer, and Tom Trabasso, guided by the constructionist theory that people search for meaning even when there isn’t any there, noted a strong difference between how people respond to narrative text versus expository text. Incidentally, they defined expository text as, among other things, data lists, manuals and technical writing. And think how much of training and presentations is devoted to that. But simply put, their findings showed that people become more engaged with stories than they do with lists.
And how did they evaluate engagement? By seeing which kind of writing led their subjects to create more inferences... in other words, predictions of what would come next. One way that Graesser’s team tested their theory was by presenting subjects with pairs of words that were sometimes related and sometimes unrelated...

What did the readers do in this situation? They attempted to create meaning where none existed. They imposed patterns and relationships they would make up on their own. But once the subjects found there was no pattern or predictability of meaning, or any kind of storyline, they began to lose interest.

Or, as screenwriter Joseph L. Manckiewicz, famous for All About Eve and The Barefoot Contessa, put it: “The difference between life and the movies is a script has to make sense, and life doesn’t.”
How ingrained is our need to make sense of the world? Well, there have been neuron-based studies designed to track how the brain processes information, which show that our minds naturally attempt to sort nonsense into meaningful chunks. And if we can’t find that connection, our minds start to wander away from the information in front of us, and we begin to search our long-term memories for how that new piece of information fits into the situation we’re facing. In other words, if something doesn’t make sense to us right away, we search our mental backfiles to give it a place to land, until it either makes sense or we let it go. Unfortunately, that takes us away from the subject matter, because we are literally drifting off to another place.

Chris Sanderson, editor-in-chief of Wired magazine, sums up the situation like this: “The tragedy of our species is that we’re wired for narrative, yet live in a world that’s random.” Likewise, in his best-selling book “Brain Rules,” molecular biologist John Medina takes this quest for meaning and focuses the blame directly on today’s highly detailed, data-heavy, story-less, PowerPoint™ presentations.
Medina takes us back to our primitive selves. “Our brains were formed to see the big picture,” he says. “When primitive man saw a saber-toothed tiger, he asked himself, “Will it eat me?” and not, “How many teeth does it have?” It may seem like a bit of a leap, but that instinct for survival may also be where we get one of the most critical elements of storytelling: drama. According to scriptwriting authority Robert McKee, drama is built upon “contradictions and contrasts.” For example, the big scary prehistoric tiger and the little caveman. But in training and presentations, what stands in contrast to the goal?

That’s the next step in our storytelling framework: Step 3 – Define the Challenge. Take, for example, our four movies. Each one of them revolves around a central conflict. So when you’re delivering your training or presentation, you need an opposing force that gets in the way of the main character, and makes his or her goal difficult to obtain.

So now it’s your turn. Who – or what – is the opposing force in each of these classic films? Just write in your answer in the text box.

In the Wizard of Oz, it’s the wicked witch. She wants the shoes that Dorothy needs to achieve her goal of getting back home. In Star Wars, it’s the Dark Side, personified by Darth Vader. In Casablanca, Rick’s nemesis is Major Strasser and the Nazis. But Sidney Greenstreet, who holds the passports, is also an opposing force. And in Goodfellas, it’s a little more complicated. Henry Hill’s climb to mob success is continually thwarted by his own, and his friends’ destructive tendencies.
But is it even plausible to have an opposing force in a training session or presentation? To answer that question, we’ll turn to one of the greatest presenters in history, the late Steve Jobs. Author Carmine Gallo, in his book, “The Presentation Secrets of Steve Jobs,” notes that the Apple chairman always used a “Villain” in his famed keynote speeches to his faithful employees.

Consider this description of the launch of the Macintosh in 1984... “In every classic story, the hero fights the villain. The same storytelling outline applies to world-class presentations. Steve Jobs establishes the foundation of a persuasive story by introducing his audience to an antagonist, an enemy, a problem in need of a solution. In 1984, the enemy was ‘Big Blue’ — IBM.

A little further on in his book, Gallo uses a mid-1980s quote from Jobs himself to paint the image of the villain that Jobs considered to be Apple’s opposing force: “Man is the creator of change in this world. As such, he should be above systems and structures, and not subordinate to them.” In other words, the opposing force doesn’t always have to be the competition, even though it was in the 1984 Apple versus IBM example. And that idea applies directly to our training and presentation situations...
Here’s a list (yes, there’s a place for them – but they have to provide their own context) of some of the typical topics people create training and presentations about, and the opposing forces that the audience has to overcome to adopt them:

New compliance rules are opposed by people being used to the previous way of operating. Safety guidelines are challenged by the drive to get the job done quickly and on budget. New sales models face the problem of people’s familiarity with existing sales techniques. Retirement planning recommendations go up against the audience’s need to pay for current expenses. The implementation of new technology is opposed by people’s comfort with existing systems. And new security protocols face the obstacle of the audience’s previous perception of moving more freely.

Please notice that the opposing forces don’t even have to be bad, or dangerous. They just have to represent a viable, and emotionally credible threat to the new behavior that the training is supposed to usher in. Because that new behavior or new perspective is the goal that the presentation is supposed to achieve.

So what comes next? In his analysis of Steve Jobs’ presentation strategy, Carmen Gallo says that once the challenge has presented itself as real and formidable… that’s when the heroic new product should be demonstrated in action.
To quote, “After identifying the villain and introducing the hero, the next step in the Apple narrative is to show how the hero clearly offers the victim -- that is the consumer -- an escape from the villain's grip.” That dramatic technique may be effective for unveiling a new product or new idea, but will it work in a training situation? Remember, it's the trainee — or the audience member — who's the hero. So in this case, something different has to take place. And the solution can be found in the storytelling framework.

That takes us to Step 4: Present the New Model.
If there's one consistency across the varied literature on storytelling, it's that you can't have a story unless you have a character arc...like the one that George McFly lived out in “Back to the Future.”

The hero must go through some kind of experience that profoundly changes his or her way of seeing and doing things. And it's that new perspective, and new set of tools, that give the character the power to meet the challenge presented by the opposing force, and ultimately reach the desired goal. Or, as is said in Hamlet, “to suffer the slings and arrows of outrageous fortune, and by opposing, end them.” In tragedies, the goal comes at too great a cost. But in feel-good stories, the original goal is either attained, or often put aside in favor of an even greater goal.
For example, take Rocky. Rocky Balboa's goal isn't to win the fight. Instead, it's to display the character, heart, and hard work it takes to go all 15 rounds with Apollo Creed, the Champion of the World. In other words, his goal isn't to be victorious. It's to not back down.

However, there's something that's required of every hero and a good story, which is to gain the understanding that his or her old way of doing things will no longer meet the challenge. And so, that person (or animal, as we see here) must adapt to, and learn, the new and better way to get the job done.

And that – just to make things clear -- is why this step is called Present the New Model. Now of course, you could argue that in the story we see depicted here, the smart little pig knew what to do all along. But as readers, we learned from our observations that the easier, less labor-intensive way of doing things (namely building your house of straw or sticks) didn’t work. So we relied on the third little pig to show us the new model.
Let’s think about this for a second. What are the new behaviors, or new tools, that our main characters learn to use in each of our four examples?

*Write in what you think they each learn.*

In the Wizard of Oz, Dorothy becomes self-reliant, the scarecrow uses his brains, the tin man shows heart, and the cowardly lion acts with courage. These are all things they learned on their journey up-and-down the yellow brick road.

In Star Wars, Luke learns the ways of the Jedi, and how to use The Force.

In Casablanca, Rick finds his true self by learning once again to be selfless instead of selfish.

And in Goodfellas, Henry Hill does not change his ways, and ultimately winds up, to use his words, “living like a shnook.”

In most stories, the acquiring of a new perspective and new tools is the longest part of the book or movie. As you might remember from “It’s a Wonderful Life,” the main character must go through experience after experience, and encounter situation after situation. And each event plays a small part in reshaping their changing view of the world, while also honing and preparing them for the climactic challenge.
To put it simply, the hero is not just the person who saves the day. Rather, it’s the person who learns to save the day. This important distinction drives home one of the fundamental similarities between effective training and storytelling. The parallel to instructional design is that in training, learners acquire new and better ways to achieve their goals. This represents a change from their old way of doing things, and a switch to something more effective.

And, much like in a story or a movie, that new tool must be put to the test in one example after another, until the hero — that is, the trainee — is ready to take his or her learning out into the real world and take on the real challenge.

In the movies by the way, this is most commonly shown in a “montage sequence.” We watch as the hero or heroine gets better and better at whatever they have to be good at. Which, sometimes, can involve an awful lot of sanding the fence, and waxing the fence. At first, in most stories — like in most training sessions — the main character doesn’t grasp why he or she has to go through all this practice, pain and testing — even though the mentor usually makes it clear right from the start. But eventually, the reason for it all is realized.
And that brings us to the final step of the storytelling model: **Step 5: Experience Triumph**. This is when the hero takes the new tools and knowledge he or she has gained, and uses them in a triumphant battle against the Opposing Force.

In many stories, this is represented as a battle between the forces of good and the forces of evil. In others, it is a one-on-one confrontation. In feel-good stories, the hero or heroine wins – not always the contest, but definitely a sense of themselves as a better person. In tragedies, when it comes time for this ultimate test, the hero succumbs to the opposing force. And in a few examples, such as romantic comedies, the two opposing sides join together.

And what usually happens? Not only is there a triumph, but there’s even an award ceremony. Think about how many movies you’ve seen where main characters earn some kind of badge of honor for their efforts -- be it receiving a medal, gaining applause and acclaim, winning another’s appreciation or love, or becoming the new leader.

In training situations, triumph occurs when the trainees are confident in their newfound abilities, and eager to pursue the goal set out for them at the beginning of the session. This too, is often marked by awards, certificates and acclaim. But the most important achievement is the new abilities and confidence that learners now have at their disposal to help them meet the coming challenges.
If that combination of skill, willingness and self-belief is achieved, then the story will be complete, and the stage will be set for the start of a beautiful new beginning.

Thank you.

Questions?
Here are some questions that came up after the presentation...

What if my audience or management doesn’t like “cutesy” approaches?

There are a few ways to deal with this issue.
• First, no one needs to know you’re using a storytelling structure. Just like no one asks if you’re using the traditional structure we all learned in elementary school.
• Second, there is a vast difference between “telling stories” and using the storytelling structure. “Telling stories” is when you and others share anecdotes and things that happened in your life. Using the Storytelling Model is when you follow the framework outlined in the 5 Steps (Frame 27).
• Three, if for some reason, you HAVE to label the technique, call it “Envisioning” or “Situation-Based Presentation Modality”…whatever would work well in your particular organization.

Can you give an example of the Storytelling Model being used in an instructional presentation, as opposed to in a movie or book?

If you look back over this presentation, you’ll see it followed the 5 Step Method twice. First at 2, 9, 10, 14 and 27, and again at 28, 33, 43, 53 and 61.
How can the Storytelling Model be applied to something like Compliance Training?

Compliance Training lends itself very well to this technique, because it’s all about what people should do in certain situations. Therefore, you have the following:

- Current Situation -- where the problem could occur
- The Goal -- to handle the situation in the appropriate manner
- The Challenge – why someone may be inclined to treat the situation in a non-compliant way
- The New Model – how the situation should be handled
- Triumph – the benefit of handling the situation appropriately

This method can be used repeatedly throughout training.

What if all you’re doing is providing information?

If you’re simply dispensing information, you’re not training. You’re delivering news. Training – and most presentations – are about getting your audience to adopt new behaviors and new ways of doing things. If you find the goal for your audience is “to learn about” anything, strike the words “to learn about” and change it to the actions that you’ll see in the future which will provide evidence that they’re doing things better than they are now.
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