



**Responsible  
Service of  
Alcohol**

**A Trainer's Guide**

## INTRODUCTION

This guide is for those who wish to provide a course to accompany the Server's Guide. The Server's Guide is quite general because it has to cover what is most relevant to the majority of people. However, the best training is more specific, so it is your job to do some research and work out what is most relevant for each of the groups that you are to train.

It is usually best to have students from similar backgrounds. For example:

- Retail (shops, supermarkets)
- Bar, café, restaurant
- Late night premises

People are very easily put off if they feel what is being covered isn't relevant to them!

If you don't have personal experience of working in a particular type of operation, then you need to spend some time speaking to people who do. Find out what the common problems are and how people deal with them. You need to build up a set of "stories" or anecdotes about typical situations and how they can be handled. These can be used as formally as "case studies" during a training session, or just described at appropriate times to help learners understand a point.

During training there will be opportunities to add to your "bank" of stories. It is a good idea to keep a log of key issues, solutions, frequently asked questions and possible responses.

At the same time, a training course is not just about content - the way information is covered is just as important. For the most effective learning, people need to be actively involved. The learning process should be stimulating and, as far as possible, enjoyable! So this means you should try to use a variety of activities and, in general, ask your trainees rather than tell them!

It is also important to remember that people are not "blank canvases". They already have knowledge and experiences, and, if they have worked in the hospitality or retail trades for a while, much of this may be useful to the course. One of your key roles is to create a comfortable, relaxed atmosphere where learners feel safe to ask questions, offer information or experiences and discuss what may be difficult issues. This allows people to learn from each other as well as from the trainer. You may learn something too! However, you do have to manage the training session to ensure that everyone is encouraged to contribute and no one is allowed to dominate. You also have to work hard to ensure that all information and activities are covered in the agreed time.

This guide aims to take you through all the key steps in planning, designing, delivering and marketing courses for the hospitality and retail trades. It will ask lots of questions and give you options. You have to decide what is most appropriate for the particular groups you are going to train.

This guide will not make you a training expert. If you wish to develop your knowledge and skills in these areas, we recommend that you contact the relevant professional bodies for advice and further training. More information on all these topics is available from specialist publications. See page 35 for a list of useful links and books.

**This guide is for those who wish to provide a course to accompany the Server's Guide.**

**Acknowledgements:** This guide was drafted by a team from Alcohol Focus Scotland's ServeWise program under contract to the International Alliance for Responsible Drinking (IARD) and the European Forum for Responsible Drinking (EFRD). ServeWise is the largest provider of social responsibility training for the licensed trade in Scotland. It works with a wide variety of stakeholders including licensing board members, solicitors, licensed trade organizations, police, alcohol action teams and training providers, such as local colleges of further education and private training organizations. The drafting team included Linda Bowie (ServeWise Manager), Joanne Worrall (ServeWise Training and Information Officer) and Mary Ellmers (National ServeWise Manager). This guide and the accompanying guide for Servers were peer-reviewed by Jim Peters (Responsible Hospitality Institute, USA) and Rob Eicholtz (Horeca Branche Instituut, Netherlands).

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## PLANNING A COURSE

Before any training begins, it is important that you meet the needs of your target audience. You may wish to gather your information by interviewing typical candidates or sending out a questionnaire.

The aim is to build a generic program which meets the needs of the type of group that you wish to train, rather than the needs of the particular individuals interviewed (the latter is customized training, when the knowledge and experience of the particular trainees would be taken into account, and the training designed or adapted accordingly).

### Summary of the Planning Phase



- Use the Identifying Training Needs Questionnaire (page 4)
- Meet with people in the licensed trade
- Gather “hard data” on the licensed trade, such as numbers and types of premises (from your local licensing authority or a government statistics office).



- Look at the 5 W's (page 5)
- Decide whether there will be one course for everyone or if there should be different types of courses
- Decide the length of the course (shorter is more attractive to the trade).



- Create a course outline. All courses should have an introduction and present
- the content of the course in sections; use a variation of activities (see page 9)
- and end with a recap and evaluation section.

## Identifying Training Needs Questionnaire

Q1. What tasks does your job include? (tick all that apply)

- Pouring alcoholic drinks
- Taking customer orders
- Giving customers advice about food or drink choices
- Serving customers alcoholic drinks
- Refusing service to customers when appropriate
- Clearing up

Q2. What do you think you need to know in order to serve alcohol safely?

Q3. What key areas should training cover to help you do this?

Q4. Is there any topic or piece of information that you think should be covered but which hasn't already been mentioned? If so, please state:

Q5. If you were to attend the training session, which of the following formats would you prefer it to take?

(tick one)

- Short units, delivered over 2 or more sessions
- One-day course
- Other (please state)

(tick one)

- Delivered by independent trainers
- Delivered by your manager using a pre-designed pack
- Delivered by a local college

Thank you for taking the time to complete this questionnaire.



## The 5 W's

The success of a training course depends on a great number of variables. It is important that you have decided exactly what you would like to achieve with the training. To help with this, you should answer five questions – the 5 W's.

**Why?** - Ask why you are training at all. What are you trying to achieve? What should learners think or do at the end of the course?

**What?** - Ask what the course content should be. What can you put over in the available time? At what expertise level will you pitch your teaching? What equipment, handouts and materials will you need?

**Who?** - Ask at whom is the course aimed. What sort of variables will you need to consider, such as level, knowledge and prior experience? Also consider learners' expectations and mind set.

**When?** - Ask whether the timing of the course is good for your target audiences and for you. Consider the time of year, time of week and time of day.

**Where?** - Ask about and prepare the course environment. Consider the room, the layout, breaks, interruptions and temperature.

## Key Decisions

You'll need to decide:

### • Target Group

Who your key target group is (e.g., bar staff or managers, or staff from a particular type of premises - such as staff of off-sales premises)

### • Type

Whether you will have variations of the course for different types of premises (e.g., off-sales, bars, late night premises)

### • Length

How long the course should last and whether it should be in one session or more. Most server training programs last one day or less. Courses just for staff tend to be shorter (e.g., 4 hours compared to 6 hours for a managers' course). Some people prefer to do a course in 2 or 3 sessions (e.g., 2 x 3 hours or 3 x 2 hours). It is possible to have a course that can be run either as short sessions or as one long session.

### • Test

You will need to decide whether or not there should be a test at the end of the course. Some courses start with training alone. Then, as they develop and become more well known, a test is added.

If you do decide to have a test, you are best to work with a suitable awarding body to develop this, if possible. In any case, most participants will appreciate receiving a certificate, even if it is just a certificate of attendance.

These can take many forms. See what your target market would like: for some, a card maybe more attractive than a paper certificate.

### ***Hints and Tips: Planning Course Timing***

When planning a course, always allow time for things such as:

- People arriving late at the start of the session
- Breaks over-running by a couple of minutes
- Moving into small groups and reconvening the whole group
- Learners going over the time allowed for tasks or small-group work

Some of this can be minimized:

- Be clear when giving instructions about timing
- Have a clock in the room that everyone can see and use to judge the length of time left for an exercise / break / etc.
- Give time checks, e.g., "5 minutes left"
- Insist that learners stop the task when the allotted time has passed

## ***Designing the Exercises to be Used in a Course***

### ***What are you trying to achieve with the course?***

Is it to give people facts?

Is it to change people's opinions or behavior?

Is it to give them skills?

Probably, it's a bit of all three. You will need to give people facts about the laws governing the sale of alcohol in their country and about alcohol as a substance. You will need to ensure that everyone shares the same opinion: that alcohol should be served responsibly. You want people to improve their practice and change the way they do things in order to ensure that they serve alcohol responsibly in their premises.

Getting people to learn facts, influencing their opinions or behavior and giving them skills require different methods of training.

You need to plan how best to present information so that participants understand, learn and remember it. There are some key points to consider.

#### **1. Retain learners' interest throughout the course:**

The brain can only focus on one thing for about 10-15 minutes. After this, it needs to be stimulated again. As a Trainer, this means that you should aim to change something every 10 or 15 minutes.

- Change the topic (e.g., move onto a different subject / take a break)
- Change the type of exercise (e.g., quiz / discussion / lecture / video / group task / small-group work)
- Change people's positions in the room (e.g., make them move seats or stand / get everyone to stand up and stretch / take a break)
- Change the way in which information is presented (e.g., PowerPoint / flipchart / video / picture / flowchart / list / anecdote or story)

Trainers should also vary their own tone of voice and position (e.g., sitting, standing) to fit with the exercise and to avoid becoming boring or monotonous.



## 2. Five main factors in how the brain recalls:

We are more likely to remember the beginning of events or the first in a series of events

- Equally, we are more likely to remember the end of events or the last in a series of events
- Recall falls rapidly after 24 hours without review
- We remember unusual things exceedingly well
- Recall is high for things linked by a story or obvious pattern

It is therefore important that we use activities that take this into consideration.

## 3. Review is important:

We know that, in the short term, recall falls rapidly without review. This also affects long-term memory. When a message is given once, the brain remembers 10% one year later; when it is given six times, recall rises to 90%. Training must include recap, repeat and review.

## 4. Use Multimedia:

Each side of the brain - left and right - responds to and stores different sorts of information. The left brain deals with logic, and the right brain with artistic or creative activities. People can store visual, hearing and feeling information. Trainers should aim to use a variety of exercises and activities and so engage different parts of the brain. Because the information will be stored in more than one part of the brain, the Trainer has multiplied the chances of the learners remembering the message.

**Visual** - Pictures, scenes, images, logos, diagrams, graphs, charts, photos, drawings

**Hearing** - Words, music, sounds, accents, conversations

**Feeling** - Emotions, smells, tastes, tactile experiments, pain / comfort

**When a message is given once, the brain remembers 10%  
one year later; when it is given six times, recall rises to 90%.**

## Summary of Activity Types

Type of activity	How it can be used	GOOD FOR:		
		facts	influencing opinion and behavior	giving skills
<b>Anecdotes (stories)</b>	Throughout history and across all cultures, humans have learned from stories. These can be funny or unusual stories – the brain finds it easier to remember unusual things and things that we can relate to our own experiences.	●	●	●
<b>Questions</b>	Questions can be used to establish current levels of knowledge; to check that new information has been understood; to review learned material. Questions to which learners have to work out the answer engage their interest and thought processes more, meaning they are more likely to remember the answers. Short, closed questions can be used to get agreement and establish a logical argument to influence opinion.	●	●	
<b>Lectures / Presentations</b>	Lectures can be used to give facts. Little participation is required from learners. Learners may be encouraged to make their own notes during the lecture and / or the information can be backed up with handouts. Best accompanied by a visual aid (see page 27).	●		
<b>Written quizzes</b>	Written quizzes can be used in the same way as verbal questioning. Written quizzes ensure that all candidates have the opportunity to come up with answers. Quizzes are best done in small groups, where learners will benefit from discussion with their partners, and there is less risk of them feeling anxious if they don't know the answer.	●	●	
<b>Discussion</b>	Discussion can either be in small groups or involve the class as a whole.	●	●	●
<b>Video / DVD</b>	Video clips can be used to present information or to illustrate a type of scenario or skill.	●	●	●
<b>Pictures / Diagrams</b>	It is said, "A picture can say a thousand words". Pictures can help make key points clear and tend to be more easily remembered.	●	●	
<b>Role-play</b>	Role-play should be used to practise situations in a safe environment. Care should be taken to ensure that feedback deals with the character that was being portrayed, and is not personal.		●	●
<b>Recap / Summarize</b>	It is important to emphasize the key points – repeating is important for memory. Recapping topics learned earlier gives the Trainer the opportunity to relate it to the current topic under discussion and reinforce earlier topics in the context of the new things you're talking about.	●		
<b>Case studies</b>	Case studies can be used to illustrate various points and processes. The Trainer must be clear about all information and be able to answer questions as required.		●	●
<b>Action plans</b>	These can help to provide a "bridge" to get the learning back to the workplace.		●	●
<b>Games</b>	Games must have clear learning objectives. They are often used as an "ice breaker" at the beginning of the course to get people used to working together and for waking people up.		●	●
<b>Assignments</b>	Learners have to find out information or skills for themselves.	●		●

## COURSE CONTENT

### Course Plan

Any course should have an introduction, a middle (when the content is delivered) and an end.



- Give trainees the aims of the course
- Give trainees the timings of the course (start, finish, breaks, etc.)
- Allow people the opportunity to get to know each other and you
- Create the “rules” under which the course will run ( e.g., are phones to be switched off?).



- Cover the content of the course, e.g.:
  - Licensing law
  - Alcohol
  - Creating the right atmosphere
  - People skills
- Try to use a variety of exercises (with no one exercise lasting too long)
- You may wish to change the order of the sections (though the order proposed here is much tested and generally works well).



- Recap the key points of the course
- Give people the chance to give feedback (evaluation).

## ***Introduction***

### **Suggestions for Activities:**

- Use slides or handouts to cover an outline of the course, including the basic timings, the key aims of the course and the benefits for the participants
- Use an introductory exercise to allow people to get to know each other and begin to relax (remember to include yourself in this)
- Do a ground rules exercise where people come up with and agree on the types of rules they would like for the day (e.g., everyone to be back on time after breaks, phones to be switched off, etc.).

### **Examples of Games:**

These are particularly good for warming people up at the beginning of the day or energizing when levels dip.

Example 1, "Talking Wall". Trainees write down thoughts on a particular topic on a post-it. These are then stuck on a wall, with particular topics grouped together. This can be a game which introduces a discussion exercise.

Example 2, "Word Association". The Trainer shouts out or recalls words on an overhead and trainees say / write other words or issues that are associated with the word, as covered during the course.

Example 3, "Catch". The group stands in a circle facing each other. Ask each learner to think of a question based on what has been covered during the course so far. You as the Trainer should start by asking a question and then choosing which learner should answer it by throwing a bean bag or a soft ball to that learner. You may wish to also say the respondent's name to make it clear for whom the bean bag / ball is intended.

## ***Suggested Activities to Cover the Content of Server's Guide***

You will need to choose a variety of different types of activities to deliver each part of the course. The following gives a range of suggestions for each section of the Server's Guide. A summary of the key learning points for each section is also provided. You should ensure that all of these topics are always covered during the course.

### **Section 1: Licensing Law**

#### **Key Learning Points**

1. The sale and consumption of alcohol is restricted by law in many countries. This can include restrictions on the hours of sale and the age at which people can buy or drink alcohol.
2. Most countries say that drunk customers should not be served any more alcohol. This is because drunk customers cause more problems for themselves, for the business and for other customers.
3. You should have systems in place to make sure that you do not break a law.

Much of Section 1 is about facts. The discussion on best practice aims to influence behavior.

#### **Suggestions for Activities:**

- Set learners an assignment to do before the course to find out what the laws are in your country or local area.
- During the course, go through what they found out, correct any mistakes and add in any bits they may have missed.
- Give a lecture on what the laws are in licensed premises, possibly backed up by handouts.
- Give a quiz to see how much learners already know. Go through the answers and fill in any gaps.
- Use a video or pictures / diagrams showing common effects of alcohol, which learners have to spot. Go through the answers and fill in any gaps.
- Lead a discussion on what systems learners already have in their work environment to ensure they keep within the law.
- Get learners to write a Store / House Policy for their own premises either during the course or as a post-course assignment. This should cover what systems they have or could put in place to make sure that they don't break the law.
- Use stories to illustrate the learning points.

## ***Example Activities for Licensing Law Section***

### **Example of an Anecdote (or Story):**

This example can be used to explain that, although something may be legal, it may not be socially responsible.

In Scotland under the current law, you normally have to be 18 to buy alcohol. There is an exception allowing 16- and 17-year-olds to buy alcohol with a meal in a restaurant area of a bar. Only limited amounts of alcohol are allowed, and only certain kinds of alcohol.

The local 16- and 17-year-old school children found this out and began to go to a local bar for lunch. Some had alcohol with their lunch. The teachers found that, when the children returned to school for the afternoon, they were very sleepy and unable to concentrate in class.

Although no one was breaking the law, it was felt that the manager was not being socially responsible to serve alcohol to the young people at lunchtime and so he was asked to stop. When the problem was explained to the manager, he was happy to stop serving alcohol to young people.

### **Example of a Written Quiz:**

These can take several different forms from multiple choice to explanatory answers. It is easier to check knowledge and, indeed, quicker to mark and to provide feedback if the questions are such that they are clearly right or wrong.

### **Example of Multiple Choice Questions:**

Good practice for closing time could include:

- (a) Shout at customers to get out – you're fed up with them and want to go home now?
- (b) Serve customers double rounds at last orders?
- (c) Remain friendly and nice to customers and ask them politely to drink up and leave?
- (d) Let customers take as long as they want to drink up?



## Section 2: Alcohol

### Key Learning Points

1. Alcohol affects the way the brain functions.
2. There is a progressive range of signs that can be observed when people drink too much. Servers must be aware of these signs and know when to stop serving customers more alcohol.
3. Levels of drunkenness can be affected by gender, food consumption, tolerance and body size.
4. Alcohol misuse can lead to a wide range of health and social problems.
5. The strength of alcohol beverages varies significantly. To help us compare, we need to look at the number of grams of pure alcohol (ethanol) contained in a given drink.

Some of Section 2 is about facts, but there is also a lot of influencing opinion and behavior.

### Suggestions for Activities:

- Give a quiz to see how much learners already know. Go through the answers and fill in any gaps.
- Give the facts about alcohol in a lecture, possibly backed up by handouts. It may be possible to get handouts from specialist organizations on certain topics – e.g., health agencies may be able to give alcohol information or the police may be able to give drink-driving information.
- Use a video or pictures / diagrams showing common effects of alcohol. You may wish to show a person becoming more and more drunk and ask learners to select when they would stop serving that person more alcohol. You may wish to use a picture / diagram of the body and ask candidates to show how they think the alcohol is processed or what parts of the body they think are affected by alcohol.
- Ask learners to name / pour a common drink. How strong is it? What measures are used to serve it? Using the formula, work out how many grams of alcohol are in the drink.
- Lead a discussion on what systems learners already have in their work environment for measuring drinks.
- Use stories to illustrate the learning points, or draw on people's own experience (e.g., discuss what signs of drunkenness learners have observed in their customers).
- Give learners the statistics about alcohol-related problems (e.g., health, accidents and crime) either in a lecture or as a handout. You could possibly get experts, such as the local police or staff from the Accident and Emergency department of the hospital, to give a talk on the effects of alcohol.
- Lead a discussion, backed up with a presentation of the facts, about how much alcohol it takes to affect a person's ability to drive.

## Example Activities for Alcohol Section

### Example of Discussion:

If you choose to use discussion as a training tool, prepare an opening question, some leading or focusing questions and a closing remark.

For example: Discussion about why we have licensing laws

**Start:** Why do we have licensing laws?  
(Possible answer: "to control alcohol sale"...)

**Focusing Question:** Is it appropriate for us to drink all day, every day?

**Leading Question:** Why do jurisdictions regulate alcohol sale?

Various answers may be given (you are looking for someone to recognize alcohol as a psychoactive substance)

**End:** Alcohol is a psychoactive substance that affects the way your brain works and the way people behave; therefore, any sale of alcohol needs to be responsible.

### Examples of Questions:

Questions can be either "open" or "closed".

Closed questions allow the respondent to answer either "yes" or "no". Short closed questions can be used to get agreement and establish a logical argument to influence opinion. For example, "Do you agree that too much alcohol is bad for a person?"

Open questions require a longer answer and would be used in most other circumstances (e.g., to establish current levels of knowledge and to check understanding). Open questions often begin with what, how, who, when, etc.

### Example of Pictures / Diagrams

Pictures / Diagrams can be used to illustrate the progressive range of signs that are observed when a person drinks alcohol.



Loosening  
Up



Relaxed



Wobbly



Memory  
Loss



Legless



Coma

### **Section 3: Creating the Right Atmosphere**

#### **Key Learning Points**

1. Environment has a big influence on how customers feel about a place and therefore on how they behave. This includes standards of customer service and housekeeping.
2. A House or Store Policy not only provides a clear summary of the laws staff and customers have to abide by, but it can also include guidance on what they can each expect in a premises.
3. There is a range of factors that make aggression and bad behavior less likely in licensed premises; there is also a range of factors that make customer behavior worse. Premises should have systems in place to minimize the risk factors and promote good practice.
4. It is particularly important to manage closing time responsibly to prevent problems for the business, the staff, customers and neighbors.

Most of Section 3 is about influencing opinion and behavior and giving learners the skills to do their jobs with confidence. Some facts are also included.

#### **Suggestions for Activities:**

- Set learners an assignment to do before or after the course looking at atmosphere in licensed premises, customer service and interactions and then go through what they found out. These could be discussed during the course or learners could be asked to draw their own conclusions.
- Ask learners to list what annoys them when they are customers and discuss how these problems can be minimized or prevented.
- Give the facts about what can influence alcohol-related behavior in licensed premises, possibly backed-up by hand-outs.
- Get learners to write a Store / House Policy for their own premises, either during the course or as a post-course assignment.
- Lead a discussion on what systems learners already have in their work environment for minimizing problems. This could focus on particular areas, such as closing time.
- Use a case study or ask learners for stories from their own experience of dealing with customers.
- Ask learners to write an action plan for the points they wish to put in practice at their premises (particularly good for managers).

## ***Example Activities for the Section on Creating the Right Atmosphere***

### **Example of an Assignment:**

An assignment would usually be done before or after a training session; it could be gathering information or applying what has been learnt. The assignment may be practical (e.g., go back to your bar and put in place a certain policy) or it could be written (e.g., write down the laws surrounding drunkenness that apply in your area).

### **Example of a Case Study:**

Case studies of real-life examples are useful to bring into the training.

### **Girls' Night Out**

It's Wednesday night, and it's Julie's birthday. She is out with a group of friends she has known since her college days. They are in a fun bar in town that has a DJ playing the latest tunes, and they are making spirits and mixers. There is a special offer on in the bar: if you make it a double measure, it's only a small extra cost. Julie and her friends quickly work out that it is just 1/3 of the price of a whole second drink, so they choose to take the offer and double up. As the night progresses, they start to show the signs of drunkenness and they all seem to be having a great laugh together. Keri, Julie's friend, asks her if she wants another drink. Julie declines, saying she wants to take it easy and feels quite drunk already. When Julie visits the toilet, her friends take her drink to the bar, where they ask the staff to stick another vodka in it. The staff do so, and this happens several times throughout the evening. Just before closing, a member of staff notices Julie slumped against a wall; a man who is not from her original group of friends is kissing her and supporting her. Julie's friends are now getting ready to leave; one of them makes a comment about Julie "getting lucky" on her birthday.

Read the case study above and then discuss these questions:

1. Have any laws been broken?
2. What are the dangers of the above situation?
3. What policies could the bar have in place to prevent this situation from arising?

### **Example of an Action Plan:**

Ask participants to write down one or two things they can do when they get back to their premises, which will help to ensure that they keep within the law. This would work well if it is done following the discussion about what systems the other learners already have in place – they can share best practice.

Any action plan should be “SMART”, that is, Specific, Measurable, Achievable, Realistic and Time-bound.

It would help if you could give learners an example to follow.

Description of Action	Write a Store / House Policy for Premises
Specific (How will you achieve this?)	I will list the key points of the law and good practice. For each point, I will write guidance for all staff to show what we will do to make sure we stay within the requirements of the law. I will give a copy of the policy to each member of staff and discuss it with them.
Measurable (How will you judge how well you are doing?)	I will check with staff that they are following the guidance by asking them questions and by observing how they deal with customers.
Achievable?	Yes
Realistic?	Yes
Time-bound (specify a time scale)	I will write the policy and give it to each member of staff within 1 week. I will ask staff questions and observe how they deal with customers in 3 weeks, and again in 6 weeks.

## Section 4: People Skills

### Key Learning Points

1. Knowing how to spot the early signs of trouble allows servers to intervene and prevent the situation from escalating.
2. Handling customer complaints and refusal of service well is a skill and can prevent conflict from arising.
3. Premises should have a plan for handling certain types of situations that have a higher risk of conflict.
4. Servers need to know how to act in conflict situations to calm customers down.

Most of Section 4 is about influencing opinion and behavior and giving learners the skills to do their jobs with confidence. There are some facts included.

### Suggestions for Activities:

- Set learners an assignment to do before or after the course looking at customer complaints, how these were handled and what the outcome was. These could be discussed during the course or learners could be asked to draw their own conclusions.
- Use role-play to practice how to deal with different situations. This could focus on particular high-risk situations, such as partying in large groups.
- Use role-play / drama or pictures / diagrams to demonstrate good and bad body language.
- Use a video or pictures / diagrams to discuss difficult or common situations. Look at what the warning signs are; when interventions can be made; what good practice could be for a given situation; what servers should avoid doing; what sort of back-up the server might need.
- Lead a discussion on what systems learners already have in their work environment for minimizing problems.
- Ask learners for stories from their own experience of dealing with customers.
- Discuss what works well when dealing with customers and what does not work.



## ***Example Activities for the Section on People Skills***

### **Video / DVD:**

These are particularly good at showing real-life scenarios or examples of good / bad practice.

Some examples of training information and resources are given on the following website - [www.efrd.org](http://www.efrd.org).

### **Example of a Role-play Exercise:**

Role-play can be carried out as a small-group exercise, with everyone taking part in the group at the same time, rather than leaving two or three people "acting" in front of an audience, which can be very uncomfortable for many learners. If the role-play is done in small groups, it is good to include one person as an observer in each group. Each observer can then report to the main group on the key things they observed (e.g., body language, key phrases, etc).

You could use role-play as an exercise to help with section 4 of the Server's Guide. For example, one person could pretend to be a bar employee, another a drunken customer and the third can observe how the bar employee handles the situation.

## ***Recap Section***

It is important to recap the main points of the course. It is also good to allow people time to reflect on what they have learned and to give them the opportunity to provide feedback.

You may choose to do an evaluation questionnaire during this period. You may also wish to do further evaluation, such as following up a sample of the learners after a period of time has passed (e.g., 2 - 3 months). This checks whether learning has actually been implemented in the workplace.

**Example of recap:** Quick-fire questions, summary points using overheads.

See pages 33 and 34 for the examples of evaluation after the course.

## MARKETING A COURSE

After designing a course, you need to market and deliver it.

To get the right people on your course, it is important to market it effectively.

You need to ensure that people turn up for training, have the correct information and find any materials describing the course sufficiently interesting to encourage them to attend. The following points are useful in helping you to do this:

- **Target Market** - Understand the target market and their needs.
- **Benefits** - Stress the benefits of staff training for premises - how is it relevant, how can it help them?

Possible points to include are:

- helps to protect the license and reduces the likelihood of a law being broken
- helps to raise standards and increases professionalism
- reduces staff turnover.

Evidence shows that, where there is high staff turnover, training can make people feel more valued and more confident, making them less likely to leave.

- **Segment and target appropriately** - e.g., by type of premises, geographical area, experience of staff member. Different market segments will have different needs and therefore require a tailored approach.
- **Competition** - Recognize the competition to the course, e.g., other forms of training, time, money, apathy. Try to make your offering more attractive.
- Ensure that the product is priced, distributed and promoted in the most appropriate way for your chosen target market.
- Where possible, ensure that your mail-outs are personalized and always follow up; do this by phone, if possible.
- Continually monitor and evaluate the success of your approach and modify if necessary.

## **Running a Course**

In running a course, a number of trainer skills are essential.

### **Atmosphere**

The Trainer is aiming to create an atmosphere in the room that from the start helps to put learners at ease. You should recognize that some people may not have been in a learning situation for a long time, so they are likely to be anxious and may need reassurance.

### **Physical Atmosphere**

- Room layout is part of the atmosphere because of the way it influences learner interaction (see pages 23-25).
- Temperature should be neither too hot nor too cold.
- Regular breaks should be scheduled.
- Disruptions should be minimized – e.g., noise from outside or people coming in with messages for the Trainer or learners.
- Lighting should be adequate – neither too dull nor too bright.
- It is helpful to have signs directing people to the right room for the course and also a sign in the room
- welcoming people to the course – this reassures them that they are in the correct room.

### **Emotional Atmosphere**

- Provide information in advance – e.g., timings for the day, venue, dress code, what will be provided, course content, assessment.
- Welcome each learner and preferably have a brief chat as they come in. This shows interest in the learners, makes the Trainer appear more approachable and helps to break the ice.
- The beginning of the course is especially important, as the emotional atmosphere at the start influences the behavior for the rest of the course.
- The Trainer should smile – this will make him or her seem more approachable and will help participants feel welcome.
- Prepare a good introduction. The Trainer should introduce him/herself, get learners to introduce themselves; discuss an outline of the course, what participants can expect, timings, rules and any administrative details – such as where the toilets are, when breaks will be. Knowing what to expect will help to prevent learner anxiety and help them relax.
- Use a range of techniques to encourage everyone to contribute to the course – more details are listed in the next few pages.
- Be wary of allowing people to work with their friends or in exclusive groups, as they are likely to pay less attention to learning.

**Use a range of techniques to encourage everyone to contribute.**

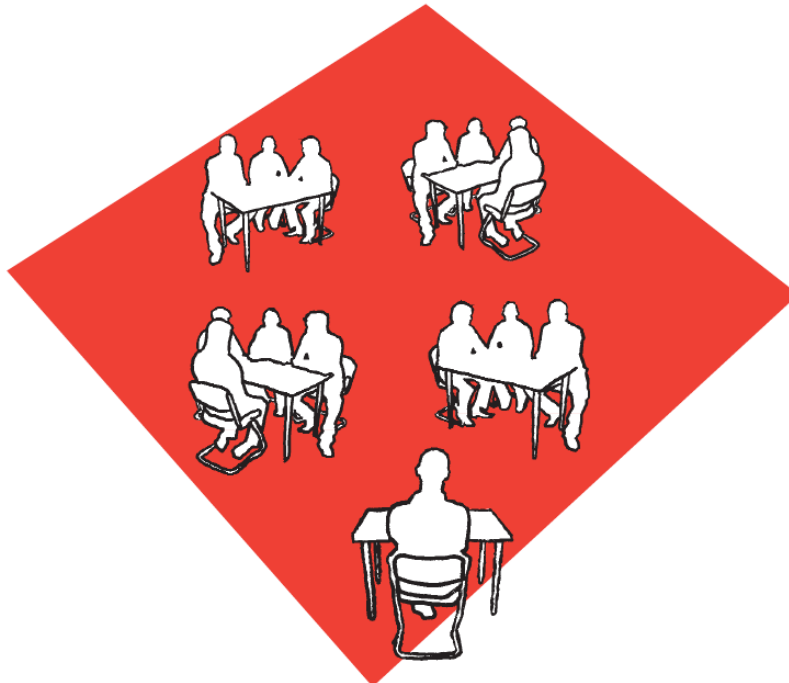
## Room Layout

There are various options for laying out the room, each with advantages and disadvantages, depending on what you're trying to achieve.

Room Layout	GOOD FOR:				
	Eye Contact with Trainer	Easy to See	Encourages Interaction	Open Environment	Trainer Moves Easily in Room
Small Groups			●		●
Theater Style	●	●			
Boardroom Style	●	●	●		
Horseshoe / "U" Shape	●	●	●	●	●

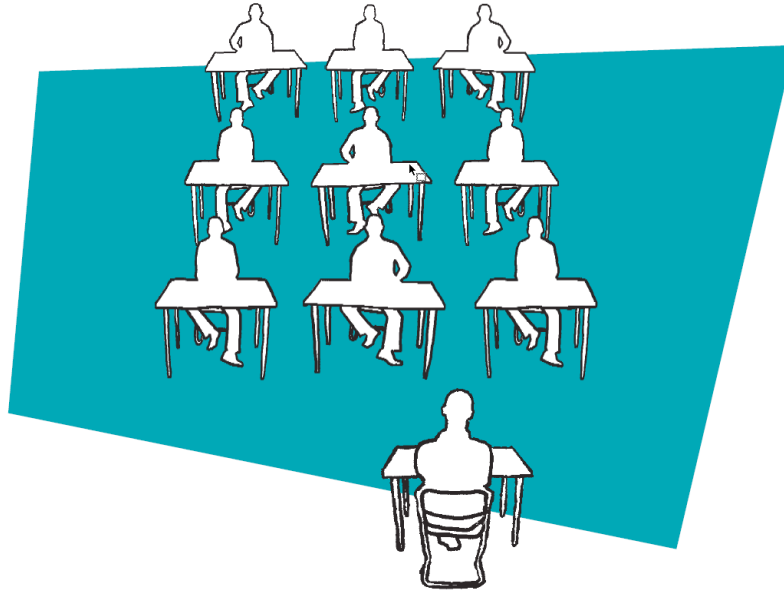
### Small Groups

The use of tables, while convenient for any desk-based work, separates the learners. Groups will find it harder to see each other when they want to report back on activities.

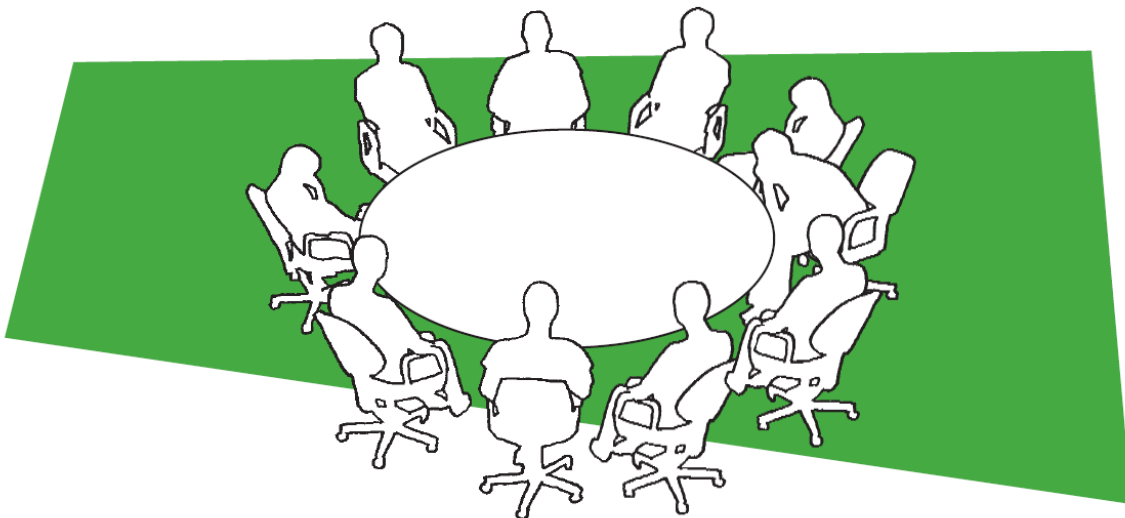


**Theater Style**

There is no eye contact between learners. This would not encourage discussion, movement or a sense of equality.

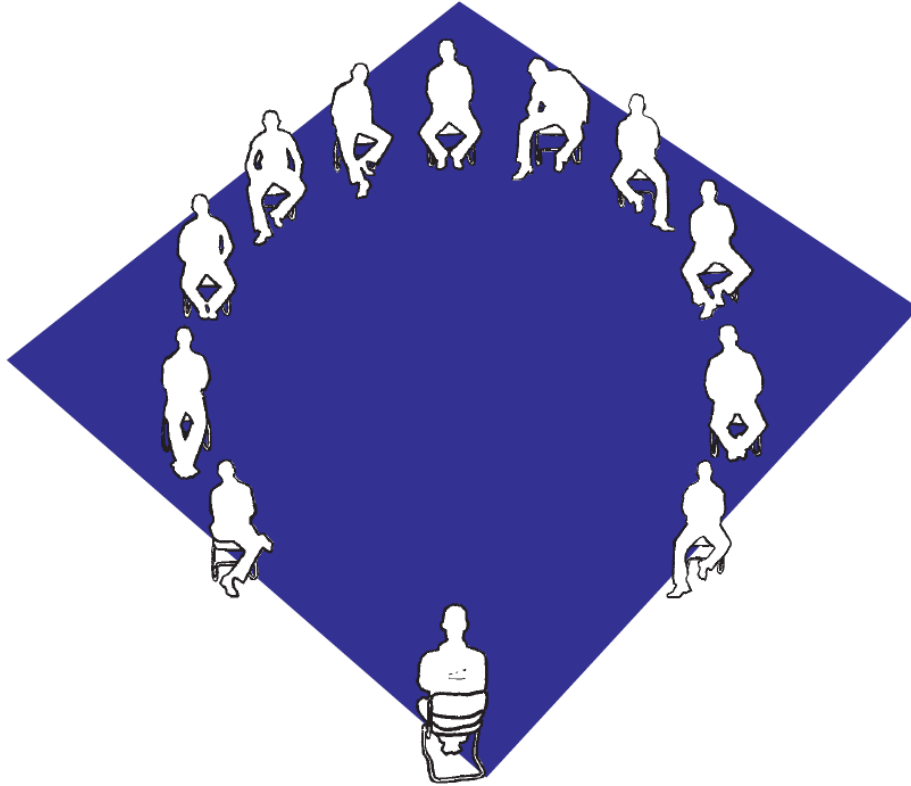
**Boardroom Style**

Large-group discussions. This is a rigid seating plan, which makes small-group work difficult. If there is enough space in the room, it can be helpful to have smaller breakout areas at the back or in the corners of the room that can be used for small-group work.



### Horseshoe or "U" Shape

The Trainer has eye contact with all learners and can move into the middle to speak to individuals.



### Eye Contact and Where Learners Sit

As a general rule, eye contact is the key to communication. The more eye contact a learner has with the Trainer or the rest of the group, the more that learner will contribute. The opposite is also true. Where learners do not have a lot of eye contact with the Trainer, they will contribute less.

The Trainer can identify louder / more confident learners and quieter / shy learners from where they choose to sit in the room with reference to the Trainer. (Obviously, this might be influenced by the learner being part of a group and sitting with his or her friends.) This is easiest to see if the tables are set in a horseshoe or "U" shape. The louder learners will tend to sit at the top of the U – at the back of the room and directly facing the Trainer or they will sit at the end of either arm of the U, beside the Trainer. The quieter people will sit at the back corners, at the top of the U, where it is difficult for the Trainer to get eye contact with them.



## Where Learners Sit and Movement

Learners will normally sit with people they know. This can mean:

- small exclusive groups
- if one person comes on his / her own, he / she will have no one to talk to
- one group can dominate the learning environment.

People naturally return to the same seat all of the time, and people may think of the seat that they originally picked as “theirs”. It is helpful to move people around:

- to encourage them to work with others
- to ensure that no person can “hide” or dominate
- to ensure that everyone contributes equally.

## Movement

Physical activity helps to keep the brain active and stops learners from feeling sleepy. Giving regular opportunities to get up and move around will be beneficial to learning. This can be done in a variety of ways:

- giving regular breaks
- having tea / coffee / juice in a different area, so that learners have to stand up and move to get a drink
- having exercises that include moving around the room or building to find out information
- getting learners to stand up and move seats for different exercises.

Trainers should be clear about when they want learners to move, for how long and what they should take with them (pen, paper, drink, everything). It can be helpful to have a separate area for coats and / or bags.

## *Using the Equipment*

### **General Points**

- Ensure that all learners can see the presentation.
- Do not stand in front of the presentation.
- Give handouts or ask learners to take notes.
- Do not turn around and read from the screen or presentation (means, the Trainer has lost eye contact with the learners, and learners can't hear the Trainer properly).
- Do not read the presentation - it gives no further explanation and learners can read it for themselves. Instead, try to provide additional information that helps to make sense of the points in the presentation.
- The presentation should be big enough for all learners to see easily, so this can depend on the number of learners, size of room, etc.
- Check that people can see and hear you by asking the person furthest away.

Various types of presentations can be used.

Be prepared for difficulties with equipment by having an alternative available, such as printed handouts.

## Verbal Communication

### Do

- Speak clearly.
- Use questions to check that learners have understood.
- Use questions to check that learners are paying attention.
- Make sure that all learners can hear – possibly use questions to check.
- Sound interested in what you are saying – this will help the learners to find it interesting.

### Do not

- Use jargon, regional meanings of phrases or big words or acronyms that might not be understood by learners.
- Mumble.
- Speak too quickly.
- Use a sarcastic or bored tone of voice – this will make it sound as if you do not believe or agree with what you are saying and therefore the learners will not believe it either.
- Speak in a monotone.

## Verbal versus Non-verbal Communication

It's not only what you say but how you say it that counts. Research has shown that, when someone gives a spoken message, the listener's understanding and judgement of that message comes from:

**7% words** - listeners put their own interpretation on speakers' words

**38% paralinguistics** - the way in which something is said (i.e., accent, tone, inflection are very important to a listener's understanding)

**55% facial expressions** - what a speaker looks like while delivering a message affects the listener's understanding the most.

\* Reference: Trainer's Pocketbook 10th Edition (2004) John Townsend

## Non-verbal Communication

### Do

- Use open body language.
- Smile appropriately.
- Look interested in what you are saying.
- Look interested in what learners say to you.
- Use eye contact to encourage contributions.
- Have equal eye contact with all learners to ensure that everyone feels included.
- Observe learners' body language and facial expressions to check for understanding and interest.
- Use small gestures to encourage contributions, such as listening noises ("hm-hmm", "yes"), hand gestures, nodding.

### Do not

- Keep a barrier (such as a desk) between you and the learners.
- Look away or read when someone is giving an answer or asking a question.
- Make facial gestures that could be rude to any learner or any part of the course (e.g., rolling your eyes, tutting).

## Feedback

### Do

Remember, feedback is a two-way process, from learner to you and you to learner.

- Give positive feedback to learners, such as “well done”, “that’s right”, “yes”.
- If the whole answer is not correct, confirm the points that learners have gotten correct, e.g., “You are right that xxx”. It may be helpful to also highlight the parts of the answer that are not correct, e.g., “You are right about xxx, but perhaps you could reconsider yyy”.
- Accept feedback from learners, but keep it in context – e.g., “The course was boring – I know everything already” is a criticism of the course content and is not a criticism of you or your training skills.
- Ask learners for feedback on the course content, the style of the exercises, the training venue, your trainer skills and anything else that can be changed or improved.
- Do a tester course with colleagues asking them for feedback on the course content, the style of the exercises, the training venue, your trainer skills and anything else that can be changed or improved.

### Do not

- Be negative.
- Be critical of learners if they get something wrong, e.g. “You’re wrong”, “That was a stupid answer”.
- Laugh at them when they’re trying hard.

## Questions

### Do

- Encourage questions – it shows that learners are paying attention and showing an interest in the topic.
- Answer the question fully.
- Check that your answer satisfies the learner.
- Have a technique for dealing with difficult questions, e.g., one person asking too many questions or questions that are more detailed than you need to cover.

Use phrases such as:

- “That’s a good question and we’ll come back to it later if we have enough time”
- “Why don’t you and I have a discussion about that at the coffee break?”
- “If I understand correctly, you’re asking...”
- “How do the rest of the group feel?”
- “Has anyone else had a similar problem?”
- “You’ve obviously done some thinking on this. What’s your view?”
- Pass the question to another learner with experience in the subject, “Bob, you’re an expert on this.”
- Use questions to check whether learners have understood what you’ve told them.
- Use questions to re-cap information covered earlier.
- Say that you will find out if you don’t know the answer.

### Do not

Make up answers or guess if you do not know.

Dismiss questions as irrelevant or stupid.

Forget to answer the question.

## ***Delivering a Course to a Group with Mixed Levels of Skills and Knowledge***

Learners' backgrounds, current levels of knowledge and skills and their learning capabilities are likely to be varied.

### **Do**

- Find out each person's skill / knowledge level before the course by asking a basic question about experience when taking the course registration. If this is not possible, then ask them before the course starts or during the introductions exercise.
- Acknowledge the different levels and, if possible, encourage the more experienced learners to help the others.
- Have an additional exercise prepared, so that your advanced people aren't growing bored or frustrated waiting for the slower people to finish their exercises.
- Allow opportunities when planning exercises to provide one-on-one coaching, should it be required.
- Remember that people learn in different ways. This relates to the left and right brain. Using a variety of exercises and activities that engage different parts of the brain will ensure that you include all learning styles.
- Provide additional summary information in a variety of formats, such as lists, pictures, flowcharts and examples.

### **Do not**

- Pick a specific skill / knowledge level and teach to that.
- Ignore the needs of those who are slower or more advanced.
- Assume that, because one person gave you the correct answer, everyone understands the information.
- 

## ***Dealing with Difficult Learners***

There will always be some learners who are more difficult to engage than others. Some general guidelines are given below.

### **Don't forget, all learners:**

- are adults – you must treat them as such
- are responsible for their own learning – you are there to facilitate their learning experience
- have experience – you must acknowledge this, give them credit for this and remember Trainers can learn from participants as well
- have different preferences in the way they learn – don't assume everyone needs to take notes or has to ask questions to show they're paying attention.

## ***Dealing with Difficult Learners***

### **“I’ve got 10 years’ experience; I don’t need to be here. What are you going to teach me?”**

- Tell such learners that their experience will be of use to you as the Trainer and to other people on the course.
- Ask these learners’ opinion on topics that are being discussed or ask them if they have an example from their experience that would illustrate the point you’re trying to make.
- Try to get them to acknowledge when they have learned something new.
- Discuss the reasons why they’re here (e.g., they need to have completed training in order to be granted a license).
- Promote the mutual benefits. They might as well relax and get what they can out of the day; if you all work together, then you’ll be able to get through everything a bit quicker.

## ***Dealing with Difficult Learners***

### **Learner who doesn’t agree with what you’re saying**

This can come up in a number of contexts. When the facts given on the course do not fit with the learner’s own experience or view of what is right and wrong, this is called “cognitive dissonance”. This will make learners feel uncomfortable and they will either alter their current beliefs to make the new information fit or they will justify their current beliefs or behavior.

We must start from their point of view. Help learners to justify changing their behavior, knowledge or attitudes by providing a real need to do so.

For example, during a course on the responsible service of alcohol, you may have some learners who do not think that there is a problem with allowing customers to become drunk.

- Ask them to explain their point of view.
- Give any relevant facts about the subject.
- Try to find ways where they already meet the standards being discussed on the course and the benefits of doing so.
- Explain other benefits of meeting the standards and give them a range of alternatives that would help them to meet the standards.



## ***Dealing with Difficult Learners***

### **Shy / Nervous learners**

- Try to find out what is making them nervous.

### **If they are nervous because they're not sure what to expect:**

- Tell them as much about the course as possible – content, approximate timings, types of exercises, what will be expected of learners, any assessments, breaks allowed, etc.

### **If they are nervous because there is a test or exam:**

- Tell them the details about the assessment, how much information they'll be expected to know, whether the course will include a mock assessment or an opportunity to practice the style of questions, how much detail they will be expected to give in their answers (e.g., multiple choice, bullet point / one word answers, short written answers, essay answers), how marks will be awarded, pass mark, how quickly they'll learn their results, re-sit opportunities.

### **If they are nervous because they think it will be like school:**

- Tell them what will be expected of learners and how the course will run – e.g., ask questions when you want, use lots of discussion rather than the Trainer telling learners what to do, everyone's experience is valid.

### **In general:**

- Ask them questions that you know they can answer in order to build their confidence.
- Praise / thank them for contributions in order to build confidence.
- Use eye contact and names to encourage contributions.
- In small-group exercises, pair them with a more confident person. This means that the more confident person can give any answers or feedback and the shy person will not have to speak in front of the whole group.

## ***Dealing with Difficult Learners***

### **Loud / Dominating learners**

- Avoid eye contact to discourage contributions.
- Ask other people, direct questions by name.
- Use phrases like "Thank you for that contribution, let's see what everyone else thinks", and ask for further contributions, or "You've answered the last couple of questions, let's hear from someone else this time".
- Have a chat with them away from the group. It may be that their contributions are not appropriate, e.g., too many jokes and wasting time. It may be that you have to ask them to be quiet and let others contribute.
- If the learner is particularly disruptive, you can ask him or her to leave. Remember, others are there to learn!

## AFTER THE COURSE

### Importance of Evaluation

It's not enough to think you've written a good course, you need to seek feedback and evaluate the course properly. In most cases, to encourage the candidates to be honest in their responses, it is best for the evaluation sheets to be anonymous (that is without the candidate's name).

There are a number of ways that you can evaluate, each with advantages and disadvantages. A summary is given below.

#### 1. Evaluation at the end of the course

- allows learners to comment while it's still fresh in their minds
- ensures you get feedback from every learner
- could give valuable feedback on how to improve the course
- the course is finished; learners want to go home and may try to complete the evaluation as quickly as possible rather than as truthfully as possible
- the learners may have enjoyed themselves and their evaluation reflects this rather than the amount they have learned or the content of the course ("happy sheets")
- learners may like the Trainer and wish to please him / her ("happy sheets")
- learners may be intimidated by the Trainer and not wish to add to animosity / conflict.

#### 2. Follow-up evaluation after a period of time

- get more accurate reflection of what was learned in relation to the role they currently do
- opportunity to answer any queries that may have come up since the course
- if evaluation is done by a neutral person, then learners will not feel any constraints about expressing their true opinions
- may be difficult to get hold of learners or to get them to participate in the evaluation
- learners may have forgotten the detail of the course (which actually reflects the relevancy of the content)
- learners' opinions may have been influenced by post-course discussions with their peers.

#### 3. Research into effectiveness of the course

- results would be of interest to a large international audience
- could give valuable feedback on how to improve the course
- would need to be a study devised by trained researcher, with careful planning over the key areas the course is attempting to improve.

### Example of End of Course Evaluation

Please take the time to complete all questions below. Your views are important to us.

About the Course		(Please circle your response)		
1. What do you think of the course overall?		Good	Fair	Poor
2. Do you think the course was	The right length of time?	Too long?	Too short?	
3. In summary, did you learn anything new about				
Licensing Law?		Yes	No	
Alcohol?		Yes	No	
Creating the Right Atmosphere?		Yes	No	
People Skills?		Yes	No	
4. Would you recommend this course to others?		Yes	No	
5. Thinking of course sections below, how useful to your job was the information you learned?				
People Skills?	Very useful	Useful	Not personally useful	Didn't do this
People Skills?	Very useful	Useful	Not personally useful	Didn't do this
People Skills?	Very useful	Useful	Not personally useful	Didn't do this
People Skills?	Very useful	Useful	Not personally useful	Didn't do this

About the Trainer		(Please circle your response)		
5. How would you rate the training venue overall?				
Licensing Law		Good	Fair	Poor
Alcohol		Good	Fair	Poor
Creating the Right Atmosphere		Good	Fair	Poor
People Skills		Good	Fair	Poor

About the Venue		(Please circle your response)		
7. How would you rate the training venue overall?		Good	Fair	Poor
Details?				

Any other comments?

Thank you for completing this evaluation. We hope you found your course both informative and effective. Please hand your completed Evaluation Form to your Trainer.

## Further Information

The same further information that is listed at the back of the Server's Guide is relevant for Trainers. However, the following links and publications are also useful from a training perspective:

[www.aerc.org.uk](http://www.aerc.org.uk)  
[www.ntis.gov.au](http://www.ntis.gov.au)  
[www.cipd.co.uk](http://www.cipd.co.uk)  
[www.ihra.net](http://www.ihra.net)

Designing & Delivering Training, David Simmons, CIPD (2003)

Promoting Learning, Kate Malone (2003)

Trainer's Pocketbook 10th Ed., John Townsend (2004)

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# IARD

INTERNATIONAL ALLIANCE FOR  
RESPONSIBLE DRINKING

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[www.iard.org](http://www.iard.org)

## Toolkit

*IARD Toolkits* provide an overview of key topics, including approaches to developing and implementing alcohol interventions, policies, and situation assessments. While the *Toolkits* provide a comprehensive overview we recommend they be used in conjunction with IARD's other, more comprehensive resources, including *IARD Policy Reviews*.

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IARD is a not-for-profit organization dedicated to addressing the global public health issue of harmful drinking. Our mission is to contribute to the reduction of harmful drinking and promote responsible drinking worldwide. This is a problem that requires new insights, urgent action, and open dialogue. Central to IARD's work is our role as Secretariat of the Beer, Wine and Spirits Producers' Commitments to Reduce Harmful Drinking.