Learning chess

Manual for chess trainers

Step 3

Rob Brunia, Cor van Wijgerden

Contents

Preface4	14: Key squares (1)	98
The third Step5	15: Pinned pieces	
Thinking ahead5	16: Threats	
Knowledge and skills6	17: Key squares (2)	
Homework7		
Training games8	Additional workbooks	123
Discussing students' games10	Step 3 extra	124
Help11	Step 3 plus	124
Competitive formats13	Step 3 mix	125
Certificates		
How to use this manual:	Plus lessons	
some pointers16	1 ⁺ : The X-ray effect	127
	2+: Pinned pieces	132
Basic lessons	3 ⁺ : The rook pawn	138
1: Completing the opening17	4 ⁺ : The intermediate move	143
2: Discovered and double check 24	5+: Vulnerability in the opening	151
3: Attacking a pinned piece31	6+: Mini-plans	157
4: Mate after gaining access36	7+: Mate	164
5: The square of the pawn43	8 ⁺ : Elimination of the defence	170
6: Eliminating the defence49	9 ⁺ : Underpromotion	175
7: Defending against	10 ⁺ : Development	179
a double attack55	11 ⁺ : Pinning	184
8: Mini-plans61	12+: Defend against mate	189
9: Draws68	13 ⁺ : The square of the pawn	194
10: X-ray74	14 ⁺ : The discovered attack	199
11: The opening80		
12: Defending against a pin85	List of concepts	203
13: Mobility92	The steps	208

The third Step

In Step 3 some new aspects of the chess training will be introduced. It is sensible to follow the lessons in Step 3 only when the two previous Steps have been successfully completed. This means not only that the students have passed the relevant exams, but also that they have managed to apply the relevant knowledge to their own games. If the students lack the skills required for Step 3, presenting them with new information is likely to be counterproductive.

As regards the trainer, we assume that he or she is familiar with the didactic approach as outlined in the first two manuals.

Thinking ahead

In this Step we continue teaching some important supporting skills. One of these is 'thinking ahead': the student calculates some possible variations and visualises the positions that arise on the chess board. It is important that we take a sensible approach to teaching this skill.

Our aim is that the students will gradually learn the skill of visualising and evaluating positions. This skill is of course relevant when doing the set exercises, but there are also other, more specific opportunities for practice. When discussing positions, whether they are from a lesson or from the students' own games, it is useful to ask the question: "What would you play if...?"

In this training method it is essential that students be approached on their own level. Only an individual approach is likely to be successful. It is also important that we bear a number of factors in mind:

- Each further move increases the degree of difficulty enormously.
- Exercises must be done using board and pieces; this makes it possible to monitor the students' performance.
- The student's level of play (i.e. their knowledge and skills) determines their performance. Stronger players will acquire this skill more quickly.
- Situations that involve 'pieces' are more easily remembered than those involving 'squares'.
- Visualising and evaluating positions ('What's going on here?') are two different skills, which may nevertheless affect each other.

This training method must also be applied in the form of specific exercises. It is up to the trainer to make sure that there is sufficient opportunity for this. Younger children can also learn to think ahead. It should be noted, though, that it will take

younger children much longer to acquire this skill. In a normal game, thinking ahead encompasses a number of skills:

- being able to calculate (not just the position but also the function of the pieces);
- being able to bear in mind the order of the moves;
- being able to evaluate new positions;
- being able to differentiate between good and bad moves;
- being able to 'read' and control planned positions.

It takes a while before students have learned to master these skills. A player must first and foremost learn to think ahead without losing the thread of the position. See also Manual 2.

Knowledge and skills

Many young people are very ambitious when playing chess. As a result they are bad at judging their own knowledge and level of play. They want to make quick progress and, guided by their experience at school – 'working hard pays off' – they try to achieve this by doing a lot of exercises.

This aim to work hard sidesteps the fact that one's level of play is formed by integrating both knowledge and skills. As regards training, this means that in addition to sufficient instruction and exercises, there must also be sufficient room for the application of knowledge and skills. The students must be given sufficient opportunity to play chess, in the form of games or finishing game positions.

It is inadvisable to measure progress in terms of the number of completed exercises. ("I have already finished Step 3!"). It is the task of the trainer to establish a connection with the students' level of play in actual games. It is possible to relate the level of play to the quality of the exercises, as well as to the relative ease with which revision and tests are done.

Provisions have been made for students who go through the basic exercises, revision and tests quickly. There is a lot of extra material available which helps these students to further develop their skills. In addition, a 'Step 3 extra' workbook, a 'Step 3 plus' workbook and a 'Step 3 mix' have appeared. Thus, there are more opportunities for practice at one and the same level.

Students who work quickly run the risk of not remembering the subject matter. While a student may be able to grasp the subject matter during the acquisition phase, this does not take away the fact that time is needed to fully understand and integrate it. Only then will students be able to apply the subject matter to their own

4 Mate after gaining access

AIM OF THE LESSON

· learning how to finish a game more efficiently

PRIOR KNOWLEDGE

• mate in one and mate in two

Acquisition

Concepts

access, pawn shield, opening ('hole')

Instruction

In the mate-in-two positions considered so far the pieces giving mate had direct access to the enemy king. To refresh the relevant knowledge some of 'mate-in-two positions' from Step 2 can be repeated. This lesson deals with mating a king that, having castled, is tucked away 'safely' behind a shield of pawns.

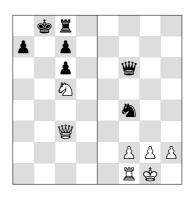
In the diagram (\Rightarrow) we see two castled kings.

On the left, the weakened position of the king spells doom for Black. A check with the queen on the b-file will quickly seal Black's fate. On the right Black must work a bit harder to gain access to (a nice way of saying 'get at') the enemy king. This can be achieved by the twofold attack 1. ... Qg5. However, this does not need to worry White too much, as he can cover the mate with 2. g3.

Access

A clever plan is required to get at the king: namely to force an opening, or 'hole', in the protective shield of pawns.

In the left part of the diagram (4) White plays





1. Qxa7+. This forces Black to take, after which White mates by playing the rook to a2.

In the right part a similar approach yields the desired result: 1. ... Qxh2+ 2. Kxh2 Rh8#.

In both cases the attacker forces an opening in the pawn shield by means of a sacrifice. The defender has no choice but to play forced moves.

The position of the pawns in front of the king can also be occupied by pieces. In that case, too, a sacrifice may prove decisive, although an ordinary exchange may also be sufficient.

In the left part of the diagram (1) Black trades queens and then delivers mate: 1. ... Qxb1+2. Kxb1 Rd1#.

In the right White trades rooks and delivers mate: 1. Rxf8+ Kxf8 2. Re8#.

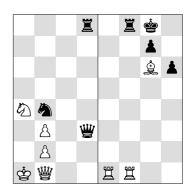
Luring away with a capture

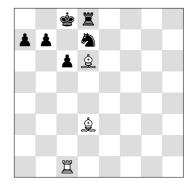
Owing to the bishop on d6 the Black king lacks breathing space. Which pawn in the diagram (\Rightarrow) prevents that White is mating? Pawn b7. White cannot capture that pawn. He must use a second way to gain access to the king.

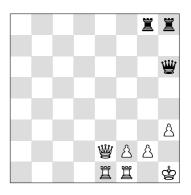
We must lure the pawn away. White can crash through with a nice rook sacrifice: 1. Rxc6+bxc6 2. Ba6#.

Point out the mating pattern with the two bishops. Mates which occur after gaining access always involve the same types of mating patterns. It pays off to remember these.

In the diagram (\$\Pi\$) we find an example of the mating pattern with two rooks: Black wraps things up with 1.... Qxh3+2. gxh3 Rxh3#. A violent approach and forcing.



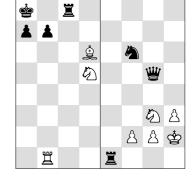




Luring away without a capture

In the left part of the diagram (1) White plays 1. Nb6+, forcing Black to capture with 1. ... axb6. This opens up the a-file, so that Black is mated after 2. Ra1#.

In the right part of the diagram the position of the White king looks secure, despite the presence of the invading rook. However, appearances can be deceptive. With 1. ... Ng4+ Black manages to expose the white king. After the forced 2. hxg4 Black gives mate with 2. ... Qh4#. With practice, these mating patterns can be mastered with comparative ease.



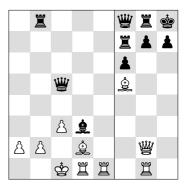
The two examples in the diagram (⇒) are more difficult, since the first move does not involve check. It is up to the defender to choose how he is mated.

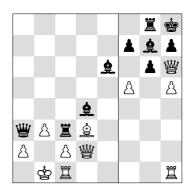
In the left part of the diagram there is no escape for White after 1. ... Qa3. After 2. bxa3, 2. ... Rb1# mates. If White does not take on a3, Black plays 2. ... Qxb2#.

In the right part of the diagram 1. Bxh7 looks attractive, since capturing the bishop invites a mate with the queen or rook on the h-file. However, Black is not forced to capture, and after 1. ... g5 it is hard to see how White can make any progress. The correct move is the pretty 1. Qg6, after which Black cannot avoid mate.

New topics sometimes make it possible to repeat topics from earlier lessons. In the present case, access goes hand in hand with double check. In the left part of the diagram (♣) Black cannot gain access to the White king by playing 1. ... Rxb3+, since after 2. cxb3 b2 is protected. The correct method is 1. ... Qb2+2. Kxb2 Rxb3#.

In the right part of the diagram the white queen is in danger. White can respond by taking h7





with the queen. Black plays: 1. ... Kxh7 and it is mate after 2. hxg6#.

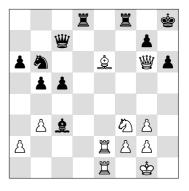
When it comes to mating the enemy king, knowledge of different mating patterns is indispensable. It is a good idea to construct a couple of mating patterns together with the students. Be sure to take a combination of pieces and a characteristic mating pattern (e.g. 里里, 豐里, 里亞, 里亞).

Search strategy

The search strategy for correctly solving the exercises is discussed using the diagram (\Rightarrow) .

- 1. The king is the target.
- 2. Find a mating pattern. The reminder and the mating patterns as indicated on the exercise sheet may prove useful here!
- 3. Break open the position of the king.
- 4. Give mate!

White does not achieve anything with 1. Bf5 Rxf5. Black's h-pawn must be made to disappear. The correct 1. Ng5 threatens mate on h7 and forces Black to capture: 1. ... hxg5 2. Qh5#.



PRACTICE

Reminder

♦ Access and mating patterns

Workbook

Explanation: This exercise sheet consists of mating patterns with two rooks and with queen + bishop. The first and seventh diagrams contain examples of the aforementioned piece combinations. The exercises contain examples of each possible combination (mirror image, colours reversed, etc.). Make sure that students recognize the appropriate mating pattern first. This will enable them to find effective moves. The main goal of these exercises is the recognition of characteristic

mating patterns. Tell the students to use the diagrams with the mating patterns, if necessary. The suggested move does not lead to mate. Mistake: Help: In general, little help is required. If so desired, the appropriate mating pattern can be pointed out. Position 11 is not solved correctly. The correct solution begins with Mistake: a 'quiet move', i.e. a move that does not involve a capture or check. Help: The position only allows one type of mating pattern. In order to arrive at this mating pattern, the pawn on g6 must be eliminated. This pawn can be forcefully removed with 1. Nxg6, but this leads to nothing after 1.... fxg6. Ask the students if they see another way (luring away). \square *Mate / Mate in two (access): B* Explanation: This exercise sheet consists of mating patterns with rook + knight and with rook + bishop. The first and seventh diagrams contain examples of the aforementioned piece combinations. The exercises contain examples of each possible combination (mirror image, colours reversed, etc.). Position 5 is not solved correctly. There are many 'distracting' Mistake: moves; the initial move is in fact a quiet move. What complicates matters is that there are possible mating patterns involving queen + bishop and queen + knight. Help: Ask the students to refute their own solutions. Many students will try to achieve a mating pattern with the queen on h7. The problem here is that 1. Oh4 h6 does not lead to mate. 1. Og6 costs a queen. It is therefore likely that this move will not be considered for too long. Ask the students to spend some more time on this move. \square *Mate / Mate in two (access): C* <u>\$</u> Explanation: This exercise sheet consists of mating patterns with two bishops and with mixed mating patterns. The first diagram contains characteristic examples involving two bishops. The exercises contain examples of

each possible combination (mirror image, colours reversed, etc.).

Mistake: The suggested solution does not lead to mate.

The mating patterns are somewhat more difficult, since more pieces are required to achieve mate. Set up a similar mating pattern on a

board and discuss.

□ Discovered and double check / Mate in two (access): A \(\hat{2}\)\(\hat{2}\)\(\hat{2}\)
Explanation: On this exercise sheet gaining access followed by a discovered or

Help:

double check are featured. A useful repetition and not too difficult.

Mistake: The solution is wrong.

Allow another try before assistance is provided. Possible question: Help:

"Where is the battery."

ANSWERS

- ☐ *Mate / Mate in two (access): A*
 - 1) 罩罩
 - 2) 1. 豐xa7+ 含xa7 2. 罩a2#
 - 3) 1. ... **公**g4+ 2. fxg4 **罩**h3#
 - 4) 1. **豐**xg7+ **含**xg7 2. **罩**1h7#
 - 5) 1. ②e6+ fxe6 2. 罩f1#
 - 6) 1. 豐xh6+ (1. 罩xh6+ 含g8!) 1. ... 12) 1. ②g5+ hxg5 2. 豐h5# **এ**xh6 2. 罩xh6#
- \square *Mate / Mate in two (access): B*
 - 1) 罩包
 - 2) 1. **營**xh7+ **含**xh7 2. **罩**h3#
 - 3) 1. ... 響xa2+ 2. \$\disp\a2 \textit{2}\a8#
 - 4) 1. \(\mathbb{\psi}\) xh7+ (1. \(\mathbb{\psi}\) g6+? hxg6) 1. ... 會xh7 2. 罩h2#
 - 5) 1. **幽**g6 (1. **幽**h4 h6; 1. **包**xh7 ②f5; 1. **এ**xh7 **国**e7) 1. ... hxg6 2. 罩h3#
 - 6) 1. 營c8+ (1. 公c7+ 含b8) 1. ...
- \square *Mate / Mate in two (access): C*
 - 1) 夏皇
 - 2) 1. 🖐 xa6+ (1. 👲 g2 👲 a7) 1. ... bxa6 2. 🙎 g2#
 - \$xf7 2. \$b3#
 - 4) 1. 營xe6+ (1. ②b5 營xh2+ 2. \$\delta xh2 hxg5+) 1. ... fxe6 2. \delta g6#
 - 1. ... **Q**a3 2. **Q**b1) 2. bxc3 **Q**a3#

- 7) 營皇
- 8) 1. 罩xc6+ bxc6 2. 豐a6#
- 9) 1. ... 罩xh2+ 2. 含xh2 營h4#
- 10) 1. **奠**xb7+ **含**xb7 2. **鬯**c6#
- 11) 1. **公**h5 gxh5 2. **營**xh7#
- - **拿**xc8 2. ②c7#
- 7) 罩夐
- 8) 1. **營**xd8+ **含**xd8 2. **罩**e8#
- 2. 乞f1) 2. 含xh2 罩h8#
- 10) 1. 營xf5+ (1. 營g2 奠xc5) 1. ... exf5 2. 罩g8#
- 11) 1. 🖾 d6+ 😩 xd6 2. 💃 d7#
- 12) 1. ... **幽**a3 2. bxa3 **国**b1#
- 6) 1. ... 響f3+2. gxf3 **含**h3#
- 7) ix
- 8) 1. ... **公**f3+ 2. gxf3 **罩**eg8#
- 9) 1. ... $2g_{4+}$ 2. hxg4 $2h_{6}$
- 10) 1. 豐xh5 (1. 皇xg6 fxg6) 1. ... gxh5 2. Qh7#
- 11) 1. ... **營**xh3 2. gxh3 **皇**f3#

Additional workbooks

The development of the Step method began in 1985. In 1987 the manual and the worksheets for the first step were published (only in Dutch). Steps 1 to 5 (the basic section) were finished in 1990.

The amount of exercises was quite unusual for that time and met with enthusiasm and acclaim, but there was also doubt. Have the children to solve so many exercises? Time has shown that this question has a positive answer. The chess world agreed. Indeed, after some 15 years the demand came for 'more'. This resulted initially in two new additions, the workbooks Extra and Plus. Later on the series Thinking ahead and Mix were added.

More training material has several advantages:

- Many students immediately take on the next Step as soon as they have completed the current one. Their playing strength usually does not keep pace, they apply what they have learned insufficiently well in their games. The students would have to play more. Thanks to the additional workbooks students at almost the same level can practice more and so they can do more and spend longer on a Step. They can spend more time with the concepts dealt with in the third Step. It is important that the degree of difficulty does not mount up too soon. The shortcoming of (too) quickly proceeding to the next Step can be somewhat countered this way.
- When solving exercises the students should look at the positions in a correct way. The more that happens, the greater the chance that they will do so in their games.
- The ability to differentiate is greatly expanded. That goes for the weaker students (extra practice on the same theme) and for the better ones (more and more difficult tasks).
- Repeat. We forget, when we do not repeat, so we must repeat so as not to forget.

At what moment can we implement these workbooks? A general recommendation is not possible. The workbook Step 3 extra can already be used while working with the basic Step 3 workbook. It is up to the trainer to decide whether parts of the Plus books will be discussed in between. That obviously depends on the level of the group but it is easy to imagine that a single theme from the Plus book pops up during simultaneous play.

A trainer who has a good picture of the entire third Step and knows what he is doing, can combine things.

Step 3 extra

A workbook with just a single reminder and apart from that only exercises. The first half of the book contains only exercises on the same themes as appeared in Step 3. These are useful not only as additional practice but also particularly so as revision.

In the second half the exercises are all mixed up, and so there is no hint as to the theme of each one. These exercises resemble most closely an actual game. Due to lack of space, there are too few of this type of exercise in the normal book which goes with the Step. See also Step 3 mix on the next page.

With this kind of mixed exercise children need more encouragement to keep trying. The role of the coach is important; these exercises have to be addressed at the right time.

The answers can be found on the website: www.stappenmethode.nl/en/solutions.php

Step 3 plus

The classification of the material in the first years of the method (1987) served well enough. But many years of experience showed that a single essential part was discussed insufficiently. That was an important motive for the Plus Series.

In these books there is space for:

- new themes:
- themes to which not enough attention was paid in the normal Step because of lack of space;
- treatment in more depth of important themes;
- themes taken from a previous Step, but at a higher level of difficulty.

We deal with all the themes in 14 Plus lessons. Many of these can be short. The main point is that the students are able to solve the exercises in the correct way. We don't advice to skip the instruction.

Step 3 mix

The best way to become stronger is to improve your game by avoiding errors. It is much more effective than learning new things and studying openings (please note: that should also be done but has no priority when more elementary skills and knowledge are still insufficient). The recommendation in the manuals is to discuss the games with the pupils. That gives important information. What skills are still at a low level? First of all, which shortcomings should be eliminated or at least worked on. The trainer is the best person to analyse the games together with his students, but in the long run the chess player will have to take that into his own hands. That is nothing new but an age-old proven way. It is fine if there is always some supervision and control.

Unfortunately experience shows that, in spite of the results of those trainers who do work in this way, it is not common practice. Although the mix-exercises cannot replace the trainer, they can help to spot the errors that need to be worked on. The answers indicate the theme of the tasks. If it turns out that the same kind of mistakes are being made frequently, it would be wise to repeat this theme. General skills, such as taking into account the possibilities of the opponent will come to the fore with a lot of (young) players. Also, the solving approach (finding the best move) is to be improved upon: without a search strategy it will not work if the preceding steps have not been rendered sufficiently automatic.

Solving exercises only is much less useful than many people think (you learn patterns but there is much more to be gained). The nub is, whether the solution is found in a 'correct' way and not by picking a random move and trying it out. Unfortunately, that happens with workbooks too, but much less than with assignments on the computer. There pupils guess incessantly and from one wrong answer to the next they quickly move on to the next move. The result is that effective learning remains at a low level when one thinks of the time spent on such exercises. The most important thing of all is that feedback is necessary (see the Manuals under the heading 'Workbook 'under explanation, mistake and help). The target is: learning to play chess better and the right approach has to be applied in a real game as well.

The plus workbooks have no mix-exercises and that has now been compensated for with the mix workbooks.

Finally, the question arises whether there are not enough other possibilities: there are already dozens of books on tactics and every year new ones are published.

Apparently there is a market.

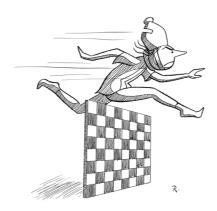
First of all, we should point out that there are not only tactical tasks to be found in the mix-workbooks. Secondly, there is not a huge difference between the easiest and most difficult task (common in almost all books). In these mix-workbooks all the tasks could be solved reasonably well if the current Step and the previous Step(s) have been properly learnt (i.e. lessons, exercises, practice - playing games and discussing the games).

As a result the level is fairly consistent. Nevertheless, some tasks may require a lot of effort. That is why the book is a perfect tool to discover one's weak spots which require some further attention.

For a stronger player it is certainly useful to solve easier tasks from time to time (but not from Step 1 if you are in Step 9). For weaker players, it is practically useless to try to solve tasks which are much too difficult. It's frustrating and they learn almost nothing from them. A chess player who wants to make progress should learn things that he can apply in his own games. Assignments which are around and just above his playing strength, have generally the right level of difficulty (right in the sense of being the most effective).

If you solve 80% of the exercises correctly then you have really mastered the Step 3 level. That is the ultimate test.

The answers can be found on the website: www.stappenmethode.nl/en/solutions.php



Die Stappenmethode

Die Originalfassung der Stufenmethode ist holländisch. In deutscher Fassung liegen vor:

Handbuch für Schachtrainer

Stufe 1, Stufe 2, Stufe 3, Stufe 4, Stufe 5

Arbeitsbuch



Vorstufe 1, Vorstufe 2, Stufe 1, Stufe 2, Stufe 3, Stufe 4, Stufe 5, Stufe 6

Extra Arbeitsbuch:

Stufe 1 extra, Stufe 2 extra, Stufe 3 extra, Stufe 4 extra, Stufe 5 extra, Stufe 6 extra

Plus Arbeitsbuch:

Stufe 1 plus, Stufe 2 plus, Stufe 3 plus, Stufe 4 plus, Stufe 5 plus

Mix Arbeitsbuch:

Stufe 1 mix, Stufe 2 mix, Stufe 3 mix, Stufe 4 mix, Stufe 5 mix

Vorausdenken Arbeitsbuch:

Stufe 2 Vorausdenken

Handbuch zum Selbststudium

Stufe 6

Software (nur Windows)

Chess Tutor Stufe 1, Stufe 2 und Stufe 3 (CD oder Download).

Demo: www.chesstutor.eu

Die deutschen Bücher und CDs können Sie

bestellen bei: www.ischach.com oder www.stappenmethode.de Auf der Website finden Sie den aktuellen Stand und die Preisliste:

 $www.stappenmethode.de \ und \ www.chesstutor.eu$



