403
Transforming L&D: From Course Catalogs to a Learning and Performance Ecosystem

Steve Foreman
InfoMedia Designs
Ecosystem overview
Transforming L&D
Key capabilities
Examples
Fred Nickols and Joel Gardner, *Knowledge Worker: Seven Skills of Knowledge Work*, International Society for Performance Improvement (ISPI), Performance Xpress, June 1, 2015
Too much to learn...
classes will be held 24 - 7 - 365 !!!
Our focus is moving...

Beyond the classroom...

...to the workplace

...and the workflow
Why aren’t we doing more of this already?
Training is important
Learners, skills & knowledge
Courses
Trainers

Perception Pyramid

how we are perceived
what we do
what we say
what we think

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Productivity is the end goal.

Performance is how work gets done. *Learning is one way to enable performance.*

Learning builds capabilities. *Training is one way we learn.*

Training is an activity.
To help people be productive, L&D solutions must be more:

- Direct
- Effective
- Instantly available
A Learning and Performance Ecosystem...

Enhances individual and organizational effectiveness by connecting people, and supporting them with a broad range of content, processes and technologies to drive performance.
Using tools and resources
Experience and practice
Self study and research
Networking with others
Guidance from experts
Observing others
Transforming L&D

Mobilize the organization
1. Socialize among early adopters
2. Identify a champion in leadership
3. Build strategic sponsorship
4. Assess readiness

Build capabilities
1. Adjust project intake process & criteria
2. Develop analysis & metrics process
3. Evolve design concepts
4. Use analytics
5. Develop enabling technology, processes & content

Ecosystem initiatives
1. Conduct pilots
2. Provide evidence of impact
3. Showcase solutions
4. Build on successes
5. Expand staff involvement
Project Intake
Technology
Inventory
IT & HRIS partners
User experience

Processes
Roles, responsibilities
Tasks, steps, handoffs
Triggers, frequency

Content
Collect
Curate
Generate

Ecosystem Infrastructure
<table>
<thead>
<tr>
<th>Intentional</th>
<th>Emergent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expert generated</td>
<td>User generated</td>
</tr>
<tr>
<td>Instructionally designed</td>
<td>Ad hoc</td>
</tr>
<tr>
<td>Managed and curated</td>
<td>Social</td>
</tr>
<tr>
<td>Centrally administered</td>
<td>Collectively administered</td>
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</table>
Organizational perspective

1. How do people use processes to get work done?
2. Where are the bottlenecks and inefficiencies?
3. How can learning and performance solutions improve process?

Ecosystem solution perspective

1. How do practitioners use process most effectively to design learning and performance solutions?
2. How flexible are the processes in designing solutions that meet the differing learning needs of different people in different situations?
Technology

- Talent Management Systems
- Professional Development Plans
- Competency-based Self Assessments
- Calculators, Configurators, Wizards
- Performance Support Systems (PSS)
- Decision Support Solutions
- Knowledgebases
- Search Tools
- Content Management Systems
- Expert Directories
- Expert Networks
- Expertise Location & Mgmt Systems
- Social Networks
- Communities of Practice
- Blogs, Microblogs, Wikis
- Authoring Tools & LMS
- Virtual Classrooms and Webinars
- Adaptive, Sims & Games, Augmented Reality

Talent Management

Performance Support

Knowledge Management

Access to Experts

Social Networking & Collaboration

Structured Learning
“A problem well stated is a problem half-solved.”

~ Charles Franklin Kettering
Business Problem

- Outcomes (goal vs. actual)
- Business metrics

Human Performance Challenges

- Critical roles
- Productivity metrics

Context

- Workflow
- Workplace
- Worker
Productivity is the end goal.

Performance is how work gets done. *Learning is one way to enable performance.*

Learning builds capabilities. *Training is one way we learn.*

Training is an activity.

What do people need to **do**?

What do people need to **know**?
Ecosystem Analysis

Phase I: Project Startup
Phase II: Investigate Need
Phase III: Explore Causes
Phase IV: Inventory Existing Solutions
Phase V: Identify Ecosystem Solution
Phase VI: Get Sponsor Buy-In
Work (Jobs, Tasks, Standards)

Workplace
Is the work environment conducive to achieving the desired results?

Workflow
Where are the bottlenecks in work processes and systems?

Worker
Do workers know how to close the gap?
Work (Jobs, Tasks, Standards)

**Workplace**
Is the work environment conducive to achieving the desired results?

**Workflow**
Where are the bottlenecks in work processes and systems?

**Worker**
Do workers know how to close the gap?

**Design Guidelines**

- Talent Management
- Performance Support
- Access to Experts
- Knowledge Management
- Social Networking & Collaboration
- Structured Learning
### When to Use an Ecosystem Component

<table>
<thead>
<tr>
<th>Component</th>
<th>Use when...</th>
</tr>
</thead>
</table>
| Structured Learning              | • People need to perform at a baseline proficiency level.  
• Regulatory compliance requires *n* hours of training.  
• Orienting people to a new job or organization. |
| Access to Experts                | • People need guidance for something they must do right away, but have never done before.  
• People need quick advice and insight on something important. |
| Performance Support              | • People need just-in-time information and guidance. Similar to Access to Experts, but especially useful when experts in short supply or unavailable. |
| Knowledge Management             | • People need quick and easy access to a variety of job-relevant information, tools, templates, work examples, references, and other resources. |
| Social Networking and Collaboration | • People need to connect, dialog, and share information and experiences with colleagues.                                                |
| Talent Management                | • People need to know how their own competencies and capabilities compare to the job standards for a current or desired position.  
• People need to manage their own professional development.  
• The work context needs to better align with job and performance standards. |
1. Don’t limit your thinking to skills and knowledge. Consider all factors that cause inadequate performance.

2. Find ways to solve performance problems within the workflow first. Interrupt work with training solutions as a last resort.

3. Identify how performers overcome obstacles and consider formalizing these workarounds.

4. Focus on the moment of need.

5. Think about ecosystem synergies. The most effective solutions often involve multiple components, each addressing different aspects of the performance problem.
6. Put yourself in the performer’s shoes. What type of solution would work for you?

7. Plan a continuous needs analysis to sustain a thriving ecosystem. Design a way to continually monitor the business measures your solution is designed to impact alongside the usage and value measures of your solution.

8. Ensure you have the right people and roles in place to operate and support your ecosystem solution after it is deployed.

9. Focus on a solution adoption strategy that supports and encourages use of new ecosystem approaches.

10. Support accurate and usable content whether generated centrally or by users.
“What’s measured improves.”

~ Peter Drucker
BEFORE ANALYSIS AND DESIGN...

Inform ecosystem analysis and solution design.

AFTER DEPLOYMENT...

1. Build evidence of the ecosystem solution’s impact.

2. Sustain and continually improve the ecosystem solution.
Ecosystem Solution Metrics

Level 1: Reaction
Level 2: Learning
Level 3: Behavior
Metadata
Transactions
Relationships

Customer’s Metrics

Key Performance Indicators
Productivity Measures
Business Results

Chain of Evidence (Level 4: Impact)
# Customer Metric Template

<table>
<thead>
<tr>
<th>Indicator:</th>
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<tbody>
<tr>
<td>Goal:</td>
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<td>Monitoring Method:</td>
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<td>Monitoring Frequency:</td>
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<tr>
<td>Monitored By:</td>
<td></td>
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<tr>
<td>Reported To:</td>
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**Ecosystem Solution Metrics**

- Level 1: Reaction
- Level 2: Learning
- Level 3: Behavior

**Metadata**
- Transactions
- Relationships

**Customer’s Metrics**

- Key Performance Indicators
- Productivity Measures
- Business Results

**Chain of Evidence (Level 4: Impact)**
THE KIRKPATRICK MODEL

Level 1: Reaction
To what degree participants react favorably to the learning event

Level 2: Learning
To what degree participants acquire the intended knowledge, skills and attitudes based on their participation in the learning event

Level 3: Behavior
To what degree participants apply what they learned during training when they are back on the job

Level 4: Results
To what degree targeted outcomes occur as a result of learning event(s) and subsequent reinforcement

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Ecosystem Solution Metrics

Customer’s Metrics

Level 1: Reaction
Level 2: Learning
Level 3: Behavior

Metadata
Transactions
Relationships

Chain of Evidence (Level 4: Impact)

Key Performance Indicators
Productivity Measures
Business Results
Metadata ... Transactions ... Relationships

People
- Job
- Organization
- Work location

Content
- Topic
- Format
- Version

Activities
- Task
- Context
- Standard

Outcomes
- Goal
- Metric
- Deliverable

Accessed, Contributed, Liked, Commented, Posted, Replied

Started, Progressed, Completed

Earned, Achieved, Delivered
• Enhanced user experience
• Sustainability

• Evidence of Impact
• Continuous improvement
Ecosystem overview

Transforming L&D

Key capabilities

Examples
Mobilize the organization

- Champion
- Sponsorship
- Project team
- Customer needs and readiness analysis

Build capabilities

- Technology platform
- Content curation
- User experience design
- Online community facilitation and sustenance
- Strategy and roadmap for technologies, processes, standards

Ecosystem initiatives

- Pilots
- Targeted, phased introduction
1. Compliance training is a legal requirement and remains a priority.

2. Social networking and online communities are a good fit with the organization’s culture: especially among executives, doctors, nurses, and researchers.

3. Integration of social networks with a curated, searchable knowledge base allows for content sharing along with discussions.

4. An initial series of pilot projects were important as we deployed new technology and developed new skills, standards, processes, and governance.
Mobilize the organization

- Early adopters
- Champion
- Sponsorship
- Project team:
  - Engage in discovery with stakeholders
  - Assess current state
  - Present findings & recommendations

Build capabilities

- Strategic planning
- Communications
- Staff development
- Technology deployment
- L&D organization design

Critical capabilities:

- Performance consulting
- Needs assessment
- Metrics & analytics
- Learning technologies

Ecosystem initiatives

- Applied ecosystem principles to proof of concept projects
- Targeted multiple echelons of the organization
- Piloted supporting processes and tools
1. The ecosystem model added credibility and structure.

2. Alignment with a strategic priority established a value proposition that resonated with leaders and employees.

3. Carefully building buy-in from the top and bottom was key.

4. Allocating time and resources for discovery helped gain supporters along the way.

5. Communicating and managing perceptions was paramount (L&D staff, leaders, employees, partners.)
Partners who help us solve problems

Learning & performance solutions

Workers, performance

Productivity is our goal
WHITE PAPER

Learning and Performance Ecosystems
Strategy, Technology, Impact, and Challenges

MARC J. ROSENBERG, PHD
STEVE FOREMAN

SURVEY
LEARNING AND PERFORMANCE ECOSYSTEMS:
CURRENT STATE AND CHALLENGES

Steve Foreman
Access to Experts: Seven Steps to Leveraging the Expertise in Your Organization.

Are You an Instructional Systems Designer, a Business Process Engineer, or Both?
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