Back to the Basics: Revisiting Great Training on Behalf of Great e-Learning

BY ALLISON ROSSETT

I'd like to talk about what I see as the heart of great training.

Of course, it is perfectly reasonable to question why I want to focus on training. Some might argue that the focus should be on performance, not training, whether that performance is replenishment, customer service, parent education, or equipment repair. Others might argue from another angle. They would say that training isn't the point; learning is, especially in an era so dependent on knowledge workers. And still others might urge us to move from e-Learning to knowledge management. Their view is that learning and lessons represent only a portion of the possibilities, as technology is deployed to create rich environments that provide just-in-time content and community.

I have no argument with any of that. I edited The ASTD E-Learning Handbook: Best Practices, Strategies and Case Studies for an Emerging Field which reflects those views with articles from 62 experts, including Marc Rosenberg, William Horton, Gloria Gery, and Sivasailam Thiagarajan. e-Learning must contribute to performance, honor learning and capacity, and reflect a “big tent” view, encompassing online knowledge bases, communities, modules, decision support, assessment and tracking. (Editor’s Note: For more on Allison’s “big tent” view, see her article at http://www.performanceexpress.org/0302/)

There are, however, many reasons to revisit the attributes associated with great training:

• It’s what clients want. "We need a
Continued on next page
Great training is purposeful

Great training is about something, but not about everything. The online student who comes to a site and is left wondering why she’s there or what this site is about will depart in a New York minute. The purpose or purposes must be both evident and resonant to the student.

Great training should say something or allow the user to discover something about a topic, whatever the topic, something that participants want to ponder and expect. It is driven by purpose. In Beyond the Podium we identified several considerations regarding purposeful training:

- Are the purposes of the training clear, obvious?
- Are the purposes of obvious value to both the individual and the organization?
- Do we communicate the purposes to the individual and their manager?
- Do we define a role for the manager, and make it easy and expected for him or her to do something relevant?
- If we are using a more constructivist approach, one that encourages participants to find meaning individually or in groups, is there meaning there for them to find?
- Do we use purposes in all possible ways: to rivet participants’ attention; to set objectives; to define strategies and assessments; and to enable self-assessment?
- Are the purposes written in a way that will interest their intended audience?
- Do our purposes include the development of independent learning and reference skills and resources?

Great training is active

E-learners, all learners, in fact, should enjoy programs that encourage them to be active. Lisa Schafer and I highlighted five kinds of activities in the June 2003 issue of Training and Development: seek, try, decide, compare and commune.

SEEK: Inquiry-oriented activities, such as WebQuests, engage learners by encouraging them to seek answers to questions by conducting research on the Internet. You can imagine how that would make sense for training about business intelligence, for example. Who is the customer? How can
you learn about them online? What are the implications of what you’ve found? Who are our competitors? What can you learn online? What more do you need to find out? (See http://edweb.sdsu.edu/EdWeb_Folder/People/Bdodge/Professional.html for a link to the WebQuests site.)

TRY: The essence of action is nudging the learner to do something. What better activity than practice of the task at hand? The try action is seen in technology training. ElementK, for example, requires e-Learners to use the feather option in a Photoshop course. Cardean.edu uses realistic scenarios to teach business skills. They create a case and then ask online participants to try their hand at authentic business tasks associated with the situation.

Want to learn to sail? It makes sense to give it a try, even if your efforts get you turned around and headed back to the starting line, as mine did. Figure 1, right, is an active online sailing program that you can try at http://www.macgregor.net/sailing/SailGame.html.

DECIDE: Should I recommend investing in that bond or this equity for this investor? Should I give this employee another chance or set him loose? What would constitute ethical action in this circumstance? Great training, online or otherwise, makes people engage, think and decide.

DigitalThink offered a sample course with just such a situation. A man is interviewing a woman for a job. He says to the woman, who looks to be Japanese or Korean in heritage, “So Noriko, your last name is ‘Smith.’ How did you get such an American sounding name?” Did the interviewer handle this well? If he wants to know if she has had other names, so he can do a complete reference check, how might he have handled it? How should his supervisor advise him?

COMPARE: A critical element in successful learning is the ability to figure out what you know and what you don’t know. How did I do on this? What was on target? What was not? How would peers handle this? How would an expert? On the First Things Fast website (http://www.jbp.com/legacy/rossett/rosett.html), training professionals can compose responses to objections by people who aren’t as keen on performance analysis as they are. Then they may compare their approach with a model effort. Figure 2 above presents a situation, in this case, confrontation with a doubting subject matter expert. Figure 3 on page 4 allows the online student to compare his response to the author’s.

COMMUNE: We know that memorable instructor-led classes are chock full of conversation, examples, debates and group effort. That should be true for online learning too.

In their contribution to the Handbook of Research for Educational Communications and Technology Thomas Duffy and Donald Cunningham reminded us of distinctions between cognitive constructivism and social constructivism. Much recent training is influenced by cognitive constructivists who typically create opportunities for learners to examine a realistic situation; seek and use relevant tools and resources; construct approaches based on research and analysis; and then assess results and efforts through comparisons to experts.
Social constructivists, on the other hand, incline us towards the convivial. They are keen on affiliation, conversation, teaming, mentoring, lunching and collaboration. Great online training, in their view, would include e-mentoring, asynchronous discussion, virtual classrooms, electronic brownbag lunches, threaded discussions, listservs, and instant messaging.

I invited my introductory educational technology students online to prepare for a final exam. The course was delivered in a regular classroom, with no online students, so the online strategy was intended to enhance our practice and generate a useful archive for use later as the date of the test came closer. This was an extra, voluntary, session, scheduled for a time I thought might be convenient.

Students and faculty used the Virtual Classroom function of BlackBoard to share screens with practice test questions. Then, synchronously, through an online discussion, we tackled each item. The interaction was lively, based on content that riveted their attention, and energized by a semester’s worth of relationships started in class and carried forward online. Approximately one-third of the students came online for the test preparation, which I considered to be a successful level of participation; more accessed the archive later.

Great training touches hearts as well as minds

As we emphasized in Beyond the Podium, there is more to great training than cognitive outcomes — I've even learned to meditate online (http://www.donot-zzz.com/).

Remember the math learned in high school and college and later avoided? Consider the time management class that made not a dent in any habits. After the online asynchronous module about cus-
customer service, will the representative take time to explain why and how, and to seek concerns as customers examine their bills?

What good is training, in a room or online, if the impact is shrugged away afterwards? Here are some strategies known to influence attitudes towards the topic at hand:

- Early on, enable learners to experience success and see the usefulness of the experience.
- Reveal the sources — the people whose ideas or experiences influenced the program; detail why they are credible and how they resemble the participants.
- Use two-sided arguments to make points. In most cases, approaches that admit multiple perspectives on the topic are more convincing than a one-sided litany.
- Inoculate learners regarding the reactions and barriers to come, by detailing ways to handle impediments.
- Use role modeling and role playing, and include lively conversations.
- Use “war stories” to engage the learners in what happened to people.
- Practice on vivid problems and cases; ask for active participation, such as seeking, finding, deciding, comparing, and teaming.
- Encourage reflection about the usefulness and meaning of what is being learned.
- Provide continuous and repeated exposure to the message and attitude, on the lips of supervisors and in takeaway materials and online programs and tools.
- Use extrinsic rewards for boring and repetitive tasks.

**Great training has shape**

Instructional systems design (ISD) was born in World War II to increase the consistency and effectiveness of military training. Devoted to taking advantage of what educational psychologists knew about learning, the effort had obvious benefits for both developers and students, because each was able to move forward with more certainty and speed.

Many have recently raised questions about the value of instructional design today (refer to the Resource List sidebar for the articles by Gordon and Zemke and by Zemke and Rossett; as well as my own article in ISD Revisited). They worry that instructional design adds time to the development process (see Thiagi’s article at http://www.thiagi.com/article-rid.html), is too general or too specific, focuses on the wrong things, doesn’t necessarily yield an improved product, and isn’t particularly useful for new media development. Even in the midst of legitimate concerns, Marc Rosenberg responded, “It’s like the old definition of democracy. It’s the worst form of government — except for all the other kinds. ISD is the best we have, if we use it correctly.”

Ruth Clark would agree with Marc, I think. She highlighted four architectures that offer shape to training: receptive, behavioral, guided discovery, and exploratory. A problem, of course, is when designers see one or the other of these as the “default” approach and apply it to everything, I’m also concerned about managers who think of one or the other of these as valid “training,” to the exclusion of the other three. Actually, each one has its particular strengths and appropriate uses.

**RECEPTIVE:** This is a traditional and familiar mode for training. We make it; they take it, or refer to it. If you are keen on this architecture, perhaps you have used Centra, Elluminate, or Placeware to create a source for placing content online. Or you have been streaming an audio example or producing an online performance support tool — perhaps to help individuals contemplate their retirement benefits. (See http://www.ssa.gov/OACT/ANYPIA/compute.html for an example.)

**BEHAVIORAL:** This expository architecture presents knowledge in small and hierarchical morsels through typically short lessons that demand action and provide feedback. Based on student performance, the program controls progress and direction. Robert Mager’s famous little book on preparing behavioral objectives is a familiar example. Ruth Clark noted that early com-
DESIGN strategies

Computer-based training programs conformed to this model, with small chunks of content and branching based on learner choices.

GUIDED DISCOVERY: This architecture is predicated on the belief that learners will seek, find, and make sense of learning assets, with proper guidance, background and rich options. Clark’s view is that the instructor or program should provide rich resources and experiences that promote individual construction of knowledge. While behavioral approaches teach to a specific set of objectives, guided discovery is predicated more on the individual figuring things out for herself. Scenarios and cases dominate. Tasks are set and communicated. Efforts are compared to rubrics and examples of effective practice.

In Figure 4 on page 5, eLearnia.com provides an online case for dentists. In this example, developed using eLearnia’s CaseLearn, the learner is diagnosing patients for periodontal disease. The learner reviews each patient’s chart, x-rays, and photos and listens to the patient’s responses during the patient interview. Brenda Sugrue, eLearnia’s principal, said, “The authenticity of the scenarios and case materials increases the likelihood of transfer to the job.”

EXPLORATORY: e-Learning portals provide rich opportunities for the exploratory architecture. Interested in learning more about poodles? See http://www.akc.org/breeds/recbreeds/poodle.cfm. Worried about SARS? Read up on it at http://www.cdc.gov/ncidod/sars/. Eager for your children to become young money managers? Steer them to http://www.practicalmoneyskills.com/. Want to provide resources to support the global sales staff? A well stocked web site can provide lessons, coaching, reusable content, and communities targeted to several product lines and geographies. The hitch, of course, is increasing dependence on a curious, motivated and independent employee. He has to know what he wants and needs, and then has to marshal the will and skill to go get it, often repeatedly, over time.

Figure 5, above, provides an example of an exploratory resource, this one devoted to the possibilities represented by the junction between training and knowledge management. Developed by the San Diego Sandbox (http://sandbox.sdsu.edu/marketing/index.htm), the site provides opportunities for professionals to get smart about knowledge management (KM) and think about it in light of their goals and tasks.

**Great training adapts to the individual**

Maggie Martinez described how important it is to personalize learning, noting the “dominant power of emotions and intentions on learning” and highlighting the value of tailoring online programs to unique human realities. In an article in *The eLearning Developers’ Journal*, May 2002, Martinez presented four dominant learning types:
- transforming learners who innovate, explore and independently and purposely drive their own future growth and development;
- performing learners who focus on getting the job done today as they systematically and capably accomplish tasks;
- conforming learners who prefer fewer risks and structured opportunities to accomplish simple steps, assigned tasks, and well-defined goals; and
- resistant learners who have personal goals that strongly conflict with learning goals set by others. The four types are derived from her research, including development of an assessment tool to get a handle on your learners.

While I hesitate to pigeon hole, Martinez’ categories strike me as useful for the design of online programs that teach. Here’s a small slice of what Martinez said about how these types guide the presentation of instruction for mass customized environments:

**Transforming learners**: Make it quick and provide the big picture first. Minimize details, making them available as needed. Provide opportunities to explore and decide when, how and about what this learner will want to use online. Clark’s exploratory architecture is on point here.

**Performing learners**: Make it quick and provide details and hands-on procedures that allow for moving forward on strategies and tasks. Provide semi-structured, coaching, and active opportunities to advance
progress. Guided discovery programs would be well suited.

Conforming learners: Make it step-by-step with explicit instruction, constructive feedback, and repetitive tasks. Minimize risk-taking and problem solving. Provide extensive guidance. Behavioral and receptive programs have been used with this population. Some guided discovery programs, with an emphasis on clarification and guidance, might be effective.

Resistant learners: Attempt to find something that taps into their beliefs and values and matches their reasons for paying attention. What moves them? What concerns them? How does this content relate to their priorities and desired benefits?

Great training is measured

Measurement, practice, testing, and feedback are very much a part of great training. My niece, Ellie, provided a vivid example. Ellie was learning to drive. She called to proclaim victory on her driving test. She crowed, “Once I’d gotten the parallel parking done on the first try, from there on I was fine. I knew I could do it.” Ellie was much more excited about success on the road test than on the written exam. Why? It was the last step. She would now get that treasured license. But there was another reason too. The written test interested her about as much as most of her high school coursework. She perceived those assessments as distant and unreal, far removed from what mattered to her. Taking the car out for a drive — well, that looked and tasted just like what she wanted in her life.

The best assessments are much like the real world for which the training is preparing students. That was true of Ellie’s driving test and all of the little practices that contributed to her eventual success.

Recently I reviewed an online program about customer service. What it had was a steady stream of pages about letting customers vent and the importance of open and closed questions. What it lacked was any meaningful opportunity to try out the material and to get feedback on efforts. That feedback could be computer generated or it could be based on comparing your efforts to those of others, a strategy used earlier, in Figure 3 on page 4. How would an employee sharpen these skills? How would this individual know if she had gotten it? How would the manager know if his employees were able to perform?

Great training never forgets people

Great training must be about people, and their goals and challenges. That’s true in the classroom, of course, and remains true as we move programs online. I admire online learning resources that tell stories, develop characters, and include authentic contexts, where, for example, a doctor is coping with a family in crisis. The wife is 75 years old, and distressed. The husband is 75 too, in a coma, and, in the opinion of the doctor, has no hope of recovery. Months before, the husband made clear that he did not wish to...
have extraordinary measures used to prolong his life. He signed a document to that effect. Now, the wife, not surprisingly, wants the doctor to save her husband. She pleads for the physician to find a miracle. Doctors, I'm sure, would be riveted by this case. A wife wants the doctor to save her husband. She has extraordinary measures used to prolong his life. He signed a document to that effect. Now, the wife, not surprisingly, wants the doctor to save her husband. She pleads for the physician to find a miracle. Doctors, I'm sure, would be riveted by this case.

They've met this woman. Such a powerful e-Learning program can only be built by attending to the needs of the people expected to learn from it — those needs must be front and center. But that doesn't always happen. I've seen programs hijacked by subject matter experts. Others dazzle with production value; but lose by making pandas dance gratuitously.

What to do? I'm intrigued with the use of personas because they assure that attention is riveted to the people for whom the programs are intended. Personas, as described by Maish Nichani (see his article at http://www.elearning-post.com/features/archives/001585.asp) and also by Elan Freydenson (http://www.boxesandarrows.com/archives/002343.php), are vivid descriptions of user archetypes. Based on analysis of the population for whom the programs are intended, personas are used to engage and educate the customer, and to bring team members to shared certainty about people and priorities. Written in a vivid way, with names, ages, jobs, opinions, and tasks, personas provide a way to consider and agree on the audience. Is the website primarily intended for sales leaders, sales people or customers? How will the assets serve the primary audience? The secondary? The tertiary?

We must not forgo the value of what happens in the classroom through snorts, nods, winks, raised eyebrows, and a pat on the back. How do we shift such moments and meaning online? Charlotte Gunawardena and Frank Zittle found that "social presence," how much a person is perceived as real in an online conversation, is a predictor of satisfaction with the computer-mediated communications. Katrina Meyers has recently suggested that successful online teaching will rely upon the vivid writing that establishes relationships and guides success. (See his article at http://www.elearningpost.com/features/archives/001585.asp) (see his article at http://www.elearning-post.com/features/archives/001585.asp) (see his article at http://www.elearning-post.com/features/archives/001585.asp).

Great training is more than a moment in time or space

Marc Rosenberg made the point in his book, E-Learning: Strategies for Delivering Knowledge in the Digital Age. We also emphasized it in Beyond the Podium. Training must be more than time served, space occupied.

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**Eyes on the prize**

Too often, I’ve heard e-Learning professionals lament culture and complain that the implementation was funky.

“It’s the sponsors. They aren’t supporting the program.”

“It’s the supervisors. They aren’t supporting the program.”

“It’s the platform. It doesn’t support our videos.”

“It’s their organization. They aren’t a learning organization.”

There is no question but that the impact of great training depends on great sys-

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**SIDEBAR Resource List**

**Publications:**


**Individual and Company Web Sites:**

1. Allison Rossett: http://edweb.sdsu.edu/people/Arossett/Arossett.html
2. Cardean.edu: http://www.cardean.edu
3. Centra: http://www.centra.com
4. DigitalThink: http://www.digitalthink.com
5. eLearnia: http://www.elearnia.com
7. Elluminate: http://www.eilluminate.com
8. Marc Rosenberg: http://www.marcrosenberg.com
11. San Diego State University, Department of Educational Technology: http://edweb.sdsu.edu/EDTEC/
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