

Beyond the Classroom

Building a Learning and Performance Ecosystem

Wednesday, August 24, 2016
Steve Foreman, InfoMedia Designs



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Learning and Performance Ecosystems

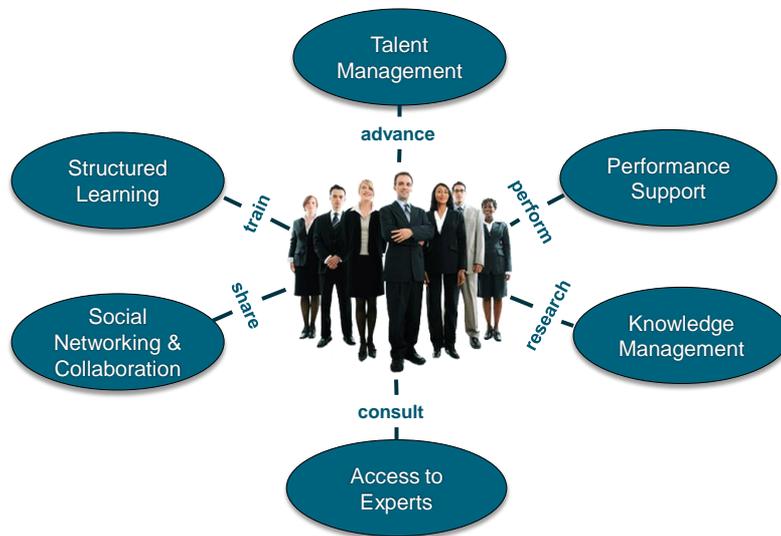


- Ecosystem components
- Ecosystem building blocks
- An ecosystem approach to L&D projects



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Learning and performance ecosystem components



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Driving directions

Ask people who use a GPS how they got there. Many can't say.

They didn't learn *how* to get from one place to another, but they got there just the same.



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Equipment repair and maintenance

Goal: A global petroleum company keeps production equipment operating at peak efficiency at all of its sites, worldwide.

Solution:



Flying experts halfway around the world was no longer viable due to cost and scarcity of true expertise. The company built a collaborative network for knowledge-sharing, including videoconferencing tools that enabled experts to consult from a distance in a much timelier manner. Consultations are recorded and published in a knowledge repository for reference, again improving response time and lowering costs.



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Insurance agency operations

Goal: Enable agencies to model and define their own job roles using a consistent, yet customizable set of job responsibilities.

Solution:



A job configuration system was created to enable each agency to define its own unique job roles by selecting relevant job responsibilities. The system assembles an onboarding process for new hires with relevant content for each job role. Experienced employees can explore new job areas they may want to move into.



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The Starbucks cup



Starbucks has replaced hand-written instructions with a sticky label that is printed when the order is made and stuck directly on the side of the cup.

Errors are reduced and service is faster.

Marc J. Rosenberg, Ph.D., *At the Moment of Need: The Case for Performance Support*, The ELearning Guild White Paper, 2013



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Closing the sale

Goal: A major telecom company wanted to land a global contract with a bank to handle electronic funds transfers worldwide.

Solution:



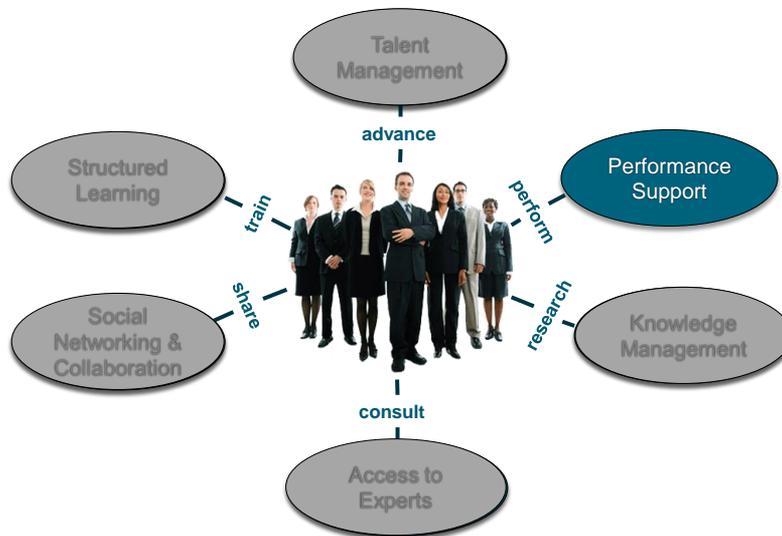
Several times a day, the sales team sent competitive intelligence and customer information to a core sales support team group at company headquarters, which, in turn, published this critical information to everyone. Upon awarding the contract to this company, the bank commented on how well the entire team always “knew” the customer.



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Does performance support enhance connectedness?



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What is the goal of performance support?



Can performance support be direct, effective, instant?



To help us be productive, L&D resources must be:

- Direct
- Effective
- Instantly available



Can performance support be used in remote places?



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Benefits of performance support



For the individual:

- Complete tasks and processes
- Diagnose problems
- Make complex decisions



For the organization:

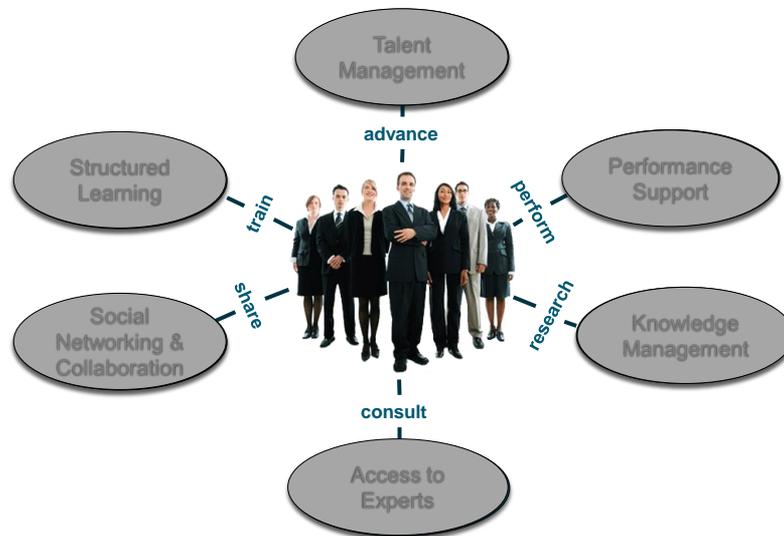
- Increased consistency
- Increased accuracy
- Less disruption to productivity



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Benefits of knowledge management



For the individual:

- Look up needed information
- View up-to-date guides and manuals
- Retrieve tools and templates



For the organization:

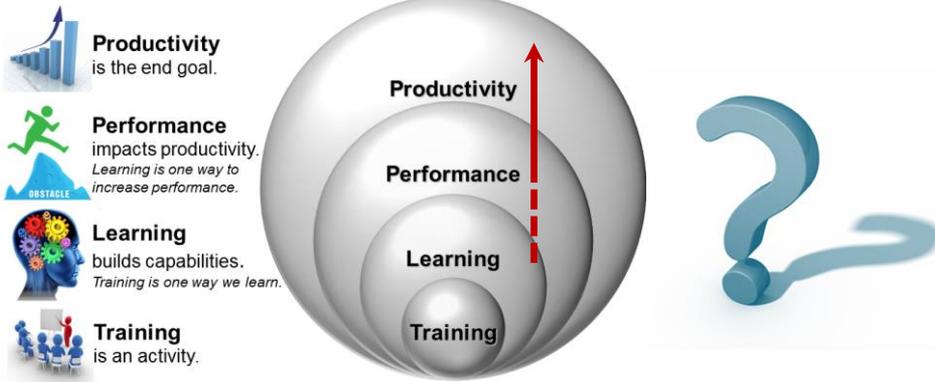
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Can knowledge management enhance connectedness?



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Comparison chart

	Training	Knowledge Management	Performance Support
Purpose	Instruct	Inform	Perform
Workflow	Postpone work	Divert work	Do Work
Value of Learning	Learning is structured	Learning is unstructured; self directed	Learning is incidental
Goal	Gain skill and knowledge	Find and share information	Accomplish work tasks



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Unresponsive landlord

Goal: An apartment renter with plumbing problems and an unresponsive landlord homeowner wanted legal advice.

Solution: The renter visited JustAnswer.com and spent \$15 to chat with a lawyer, who asked a set of questions and presented some options.



The renter wrote a letter with language provided by the lawyer and sent it to the landlord via certified mail.

The plumbing was fixed the day after the landlord received the letter.



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Equipment repair

Goal: Field technicians were having trouble fixing machines at client locations, resulting in increased costs and lower customer satisfaction.



Solution:

Frustrated with technical issues that were not covered in training nor covered in the field manual, technicians began emailing one another for advice and help. Responses were often immediate and very useful. The collaboration helped the company to identify new problems much earlier than before, enabling it to solve them before any major negative customer impact.



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Sales and engineering partnership

Goal: A global manufacturing company wanted more interaction and idea sharing between sales and engineering to drive product development.



Solution:

Quarterly summit events were organized for both functions to mingle.

Product concept wikis were used for both groups to share and react to ideas.

Sales increased as products became more customer focused.

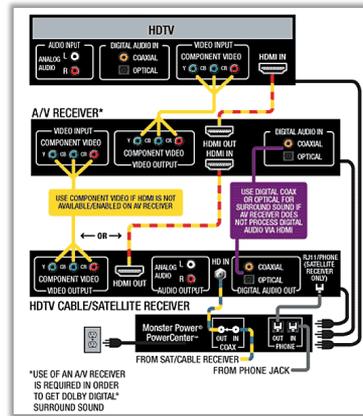


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Home theatre setup

A good installation guide can be the difference between a quick job followed by a relaxing day watching the big game, or hours spent on a help line.



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Disaster recovery

Goal: The IT department of a major financial services company wanted to ensure its staff had consistent and reliable access to key systems methods and procedures.



Solution: Depending on who you spoke with, different IT people had a variety of viewpoints on how to handle mission critical issues like data backups, system upgrades, and disaster recovery procedures.

The firm built a document repository of critical IT procedures, including disaster recovery.

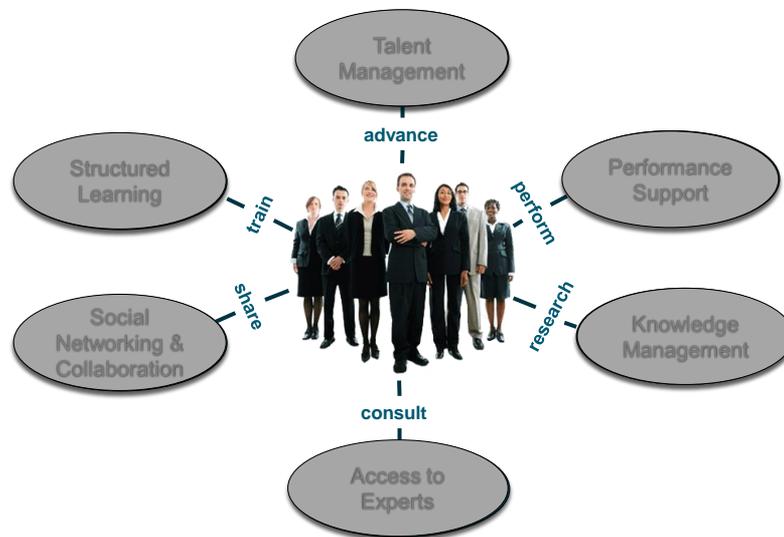
After the devastating loss of a building in which a major data center was located, the firm recovered its operations quickly.



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Learning and performance ecosystem components



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Benefits of access to experts



For the individual:

- Get expert guidance
- Gain advanced knowledge and insight
- Test assumptions and ideas

For the expert:

- Achieve recognition
- Teach and mentor



For the organization:

- Distribute and leverage expertise
- Increased accuracy
- Smarter decisions and actions



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What is the primary goal of access to experts?



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Can access to experts be direct, effective, instant?



To help us be productive, L&D resources must be:

- Direct
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Can access to experts be used in remote places?



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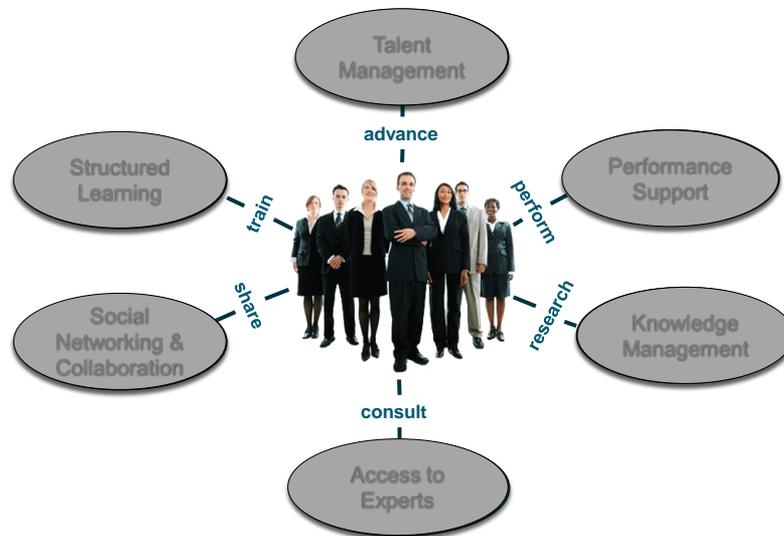
Can access to experts enhance connectedness?



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Benefits of social networking and collaboration



For the individual:

- Share information and ideas
- Collaborate on work projects
- Tap into the wisdom of the crowd



For the organization:

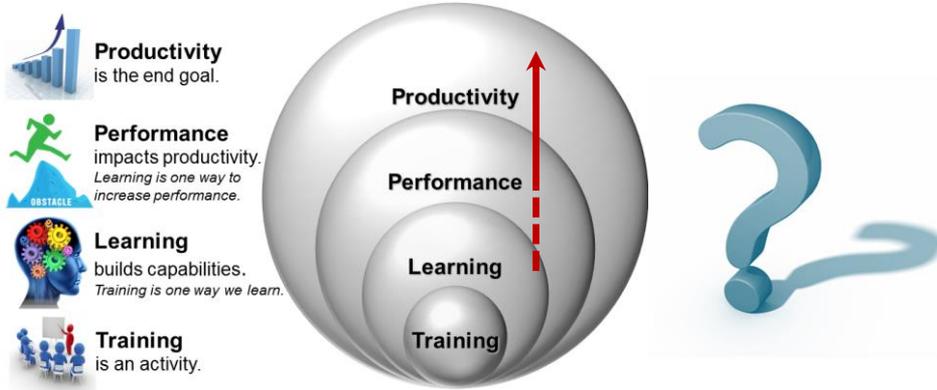
- Distribute and capture knowledge
- Increased speed
- Increased accuracy



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What is the primary goal of social networking and collaboration?



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Can social networking and collaboration be direct, effective, instant?



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Can social networking and collaboration be used in remote places?



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Can social networking and collaboration enhance connectedness?



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Solution selling transformation

Goal: A telecommunications equipment manufacturer wanted to move from selling single products to selling solution suites.



Solution: The organization developed a solutions selling process. Each month, a group of star sales reps were selected to spend a few days at a remote mountain resort where they were introduced to the process. Retired CEO's were hired to play the role of the customer, allowing the sales reps to practice applying the sales process.



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Professional coach

Goal: Improve resume, public speaking, and interview skills.



Solution: Set a goal and provide some professional information about yourself.

System pairs you with a career coach.

Meet 1-on-1 with career coach to work on your goal.

Access content published by your coach.



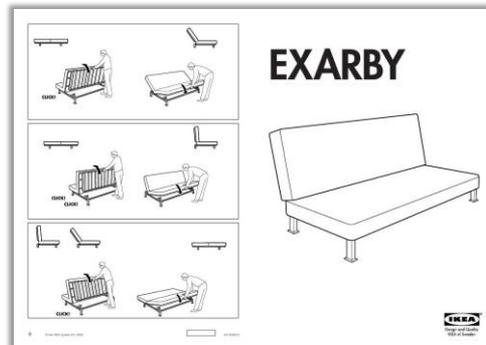
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IKEA assembly instructions

IKEA assembly instructions contain no words, only pictures.

Yet, the instructions are clear and complete, enabling you to complete the assembly easily and relatively quickly.



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Claims processing

Goal: Claims processors at a health insurance company wanted to keep track of important claims processing information.

Solution: Each worker kept their own set of email folders organized by topic where they stored emails they had received on claims processing policies, procedures, rules and guidelines.



The email folders could be searched and emails could be forwarded to other claims reps.



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Small business payroll

Goal: A small business owner needed to file quarterly federal, state, and local payroll tax returns accurately and efficiently.

Solution: She wrote a job aid for herself with step-by-step instructions and filing web sites. She also set up recurring scheduled reminders in her calendar.

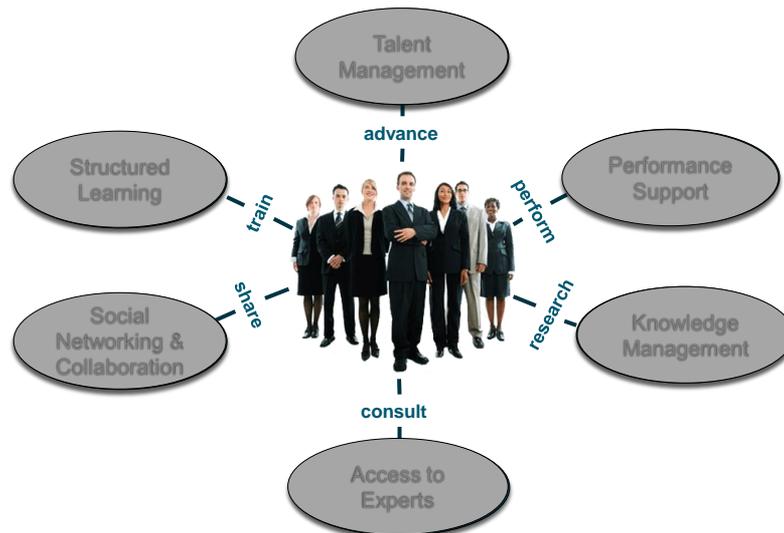
No longer needing to worry about remembering all the steps, she felt assured that the filing was done correctly each quarter, allowing her to avoid penalties and time consuming filing corrections while staying focused on her business.



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Learning and performance ecosystem components



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Benefits of structured learning



For the individual:

- Develop skills and knowledge
- Meet compliance requirements
- Earn professional credentials and certifications



For the organization:

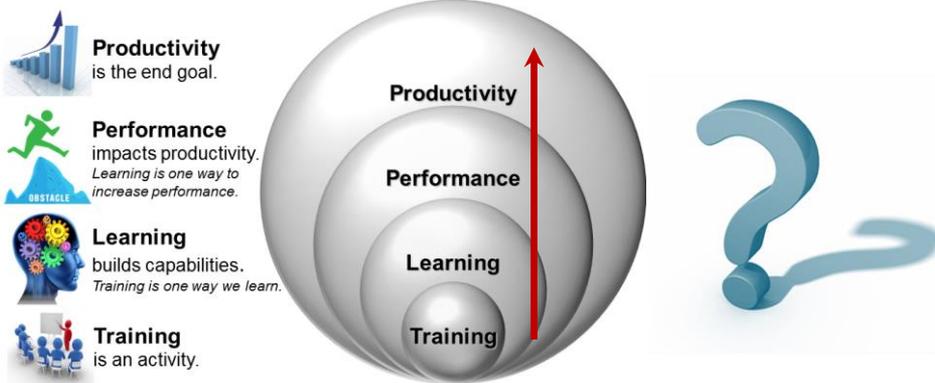
- Meet compliance regulations
- Train new hires, promotees and transfers
- Introduce new policies, procedures, and systems



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What is the goal of structured learning?



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Can structured learning be direct, effective, instant?



To help us be productive, L&D resources must be:

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Can structured learning be used in remote places?



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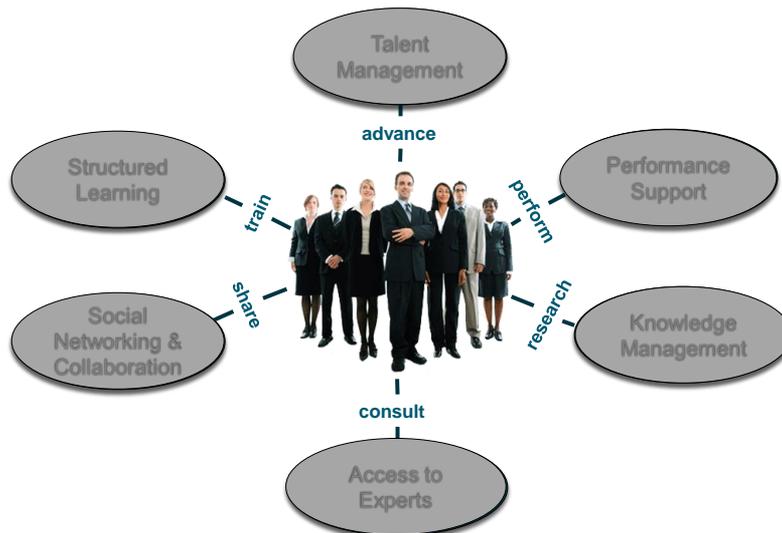
Can structured learning enhance connectedness?



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Benefits of talent management



For the individual:

- Self-assessment
- Explore career pathways
- Manage self-development



For the organization:

- Reward high performance
- Recognize candidates for advancement
- Make workforce optimization decisions



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Learning and Performance Ecosystems



➤ Ecosystem component

➤ Ecosystem building blocks

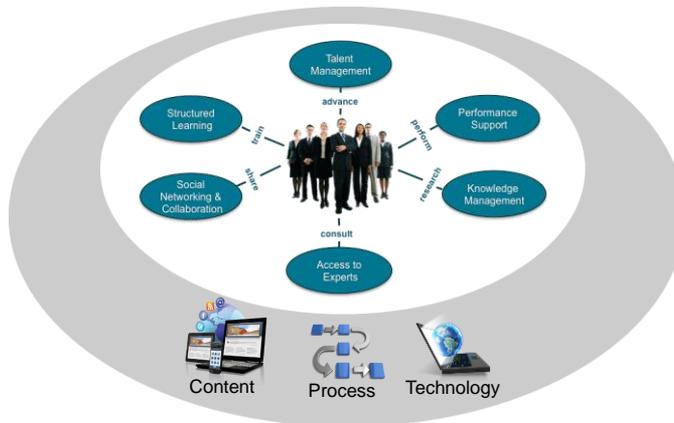
➤ An ecosystem approach to L&D projects



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Ecosystem building blocks



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Content



Content

Intentional	Emergent
Expert generated	User generated
Instructionally designed	Ad hoc
Managed and curated	Social
Centrally administered	Collectively administered



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Question...

How much value do you think exists by way of NPS employee generated content?

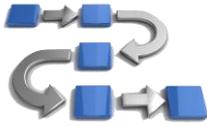
How can it be leveraged?



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Process



Process

Organizational perspective

1. What processes are in place to get work done?
2. Are there any bottlenecks or inefficiencies?
3. How can learning and performance solutions make these processes work even better?
4. What creative workarounds do people use that can they be leveraged?

Design perspective

1. How can L&D identify opportunities for learning and performance solutions?
2. What new processes are needed to create and sustain learning and performance solutions?
3. What are we doing well that can be leveraged?



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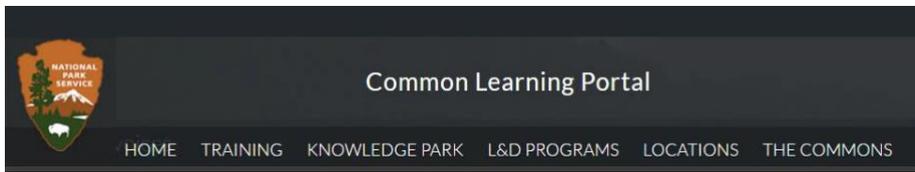
Ecosystem processes



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Technology



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Organizational culture



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Cultural readiness



1. Sponsorship
2. Attitudes toward learning and performance
3. Perceived charter of the L&D function
4. Evidence of value
5. Budget, resources, and time
6. L&D paradigm



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Question...

How do you think the NPS culture affects learning and performance ecosystems?



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Learning and Performance Ecosystems



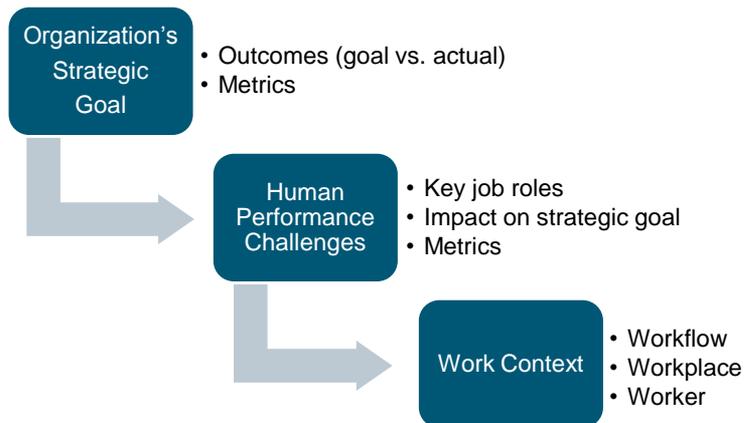
- Ecosystem component
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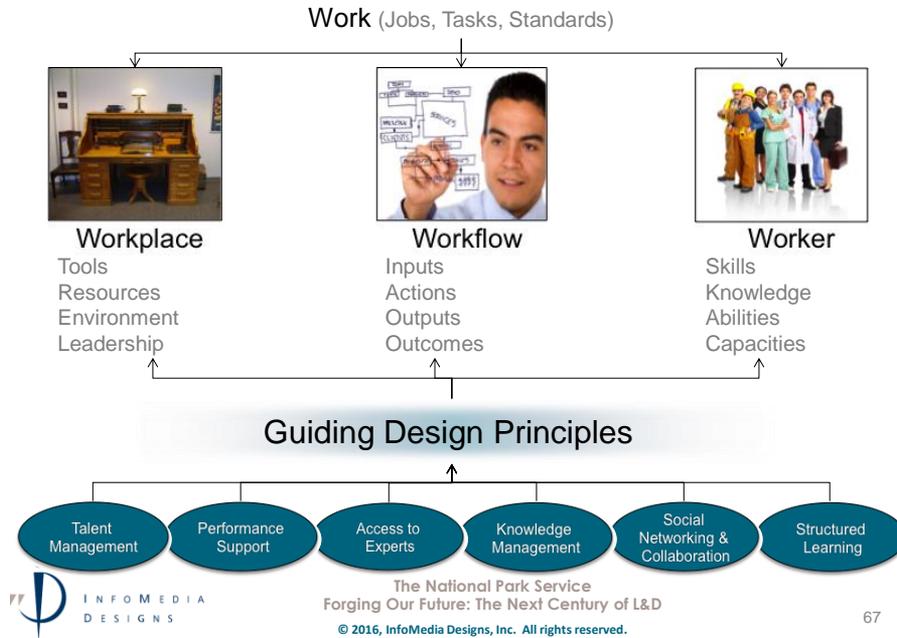
Focus on what the organization is trying to accomplish



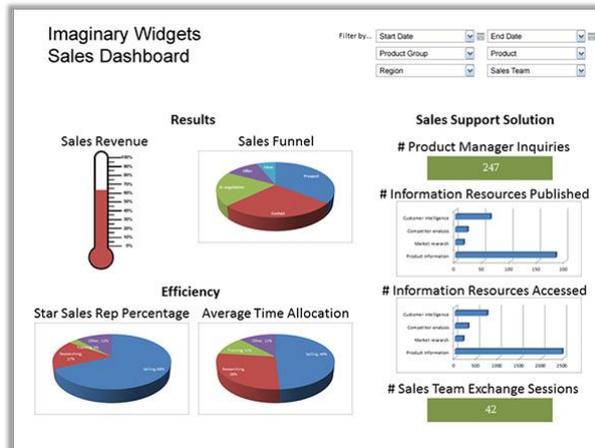
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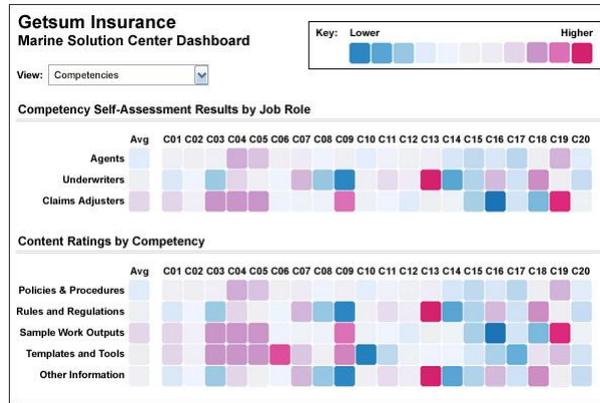
Analysis and design context



Ongoing needs analysis



Visualizing the data



Guiding design principles

1. Don't limit your thinking to skills and knowledge. Consider all factors that could hinder 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.

Guiding design principles

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.



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White papers



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Research reports



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