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HOW TO REBOOT TRAINING FOR TANGIBLE BUSINESS IMPACT

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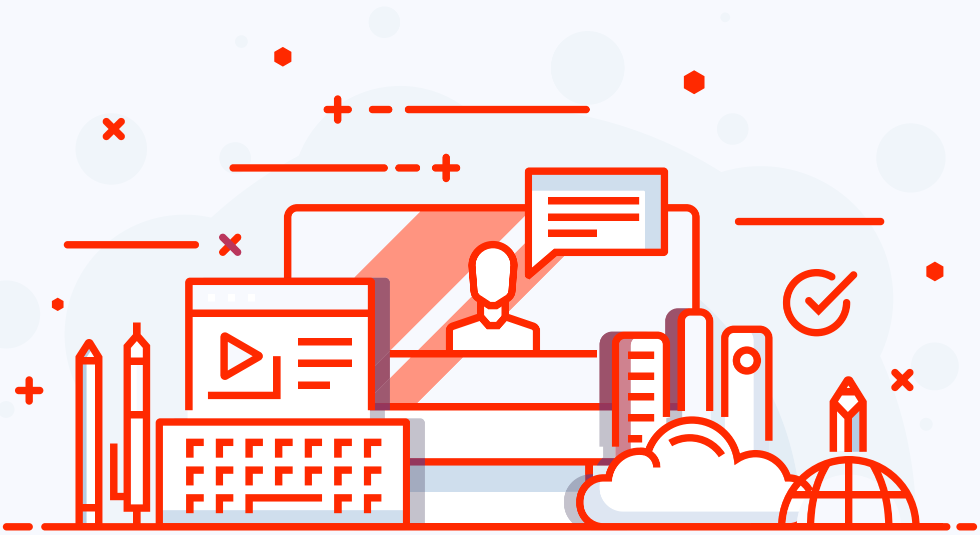
PEOPLE ALCHEMY



How to Reboot Training for Tangible Business Impact

Take a step back

What would we do if we could ‘reboot’ L&D, and more specifically, training?

There can hardly be an organisation that has not made fundamental changes to their operating model over the last few years. Are you going to take the opportunity to change your way of working in L&D as well?

Management is well aware that with accelerated change comes the need for accelerated learning and significant changes in how people do their jobs. Think of this in terms of Kurt Lewin’s change model where the first step is to unfreeze what you want to change, then mould it to a new shape, then refreeze it. The pandemic has unfrozen the dogma and old paradigms held

I wrote the first version of this ebook in July 2020 in the depths of the pandemic. It was updated in September 2021 because so much had changed. Yet, despite the effects of the pandemic on the design and delivery of L&D initiatives, the basic principles are still the same. It reminds me of the lines from a poem by Amanda Leigh, ‘Everything’s different, and yet everything’s the same. Time is just a crazy game’. People asked me to revisit the guide and update it because they found the original version so valuable. This 3rd edition in December 2022 focuses less on the pandemic and more on those unchanged basics. I sincerely hope you find it useful.

My best wishes, Paul

by managers on how L&D should be done. L&D has responded by moulding and shaping new ways of doing things. My concern is that many of these responses were done quickly, and these prototype solutions are starting to refreeze in a less than optimal state. The initial sticking plaster responses have now, in most cases, proved inadequate for the long haul and the realisation has landed that a fundamental redesign is needed to get an acceptable return. Ticking the 'it is now digital' box is not enough. And of course, we now have hybrid L&D needs which require another rethink. We MUST take a step back and think about what shape we want our L&D to be in before it freezes into a new normal that gets us stuck in a place we don't want to be.

There is much talk of learning lessons and building anew as we consider our world post pandemic. What about you? L&D can't go back to what it was. It has changed too much, and we have learned and experienced so much that is new, that the old way is no longer tenable. But will senior management want to stuff L&D back into the old mould? And if they try, will you let them? What have they learned about L&D during the pandemic, and what do they still need to learn?

Will management want to stuff L&D back into the old mould?

There are many ways to deliver training and other learning initiatives with a myriad of possible blends. Think of these as different species adapting to a new post pandemic environment. Which ones will succumb to the forces of natural selection? Which ones will be found wanting as they fail to deliver the impact that organisations need to survive?

Consider this question: "What is the purpose of training?"

Stop reading now and reflect — what is your answer?

Often the initial answers that people give are about learning, knowledge, new skills, compliance etc. Then the answers start to change as people reflect on the desired end result from training. They usually begin to home in on a purpose for training that is about helping people develop so they can be better at delivering what they do on behalf of their employer. They arrive at something like "The purpose of training is to improve competence and thereby change the way people do things, so they perform better and consistently get better results at work".

"What is the purpose of training?"

In essence, unless the training is fulfilling some compliance requirement, it all comes back to behaviour change. We train people because we want them to change their behaviour, therefore our driving question should be "How can we deliver behaviour change?"

Notice how different this question is from the one that many in L&D use which is, "How can we deliver this training content?" This question arises because their start point is a response to a request for a training course on Skill X. Now, everyone knows what the curriculum for a course on Skill X should contain. It's what has always been delivered either here or elsewhere to train people on Skill X. So, we tweak it, and we think of different and maybe even innovative ways to deliver the content. We end up asking, "How can we deliver this training content?"

"How can we deliver behaviour change?"

Which of these two questions, and therefore which approach, do you think will bring us closer to serving our organisations with what they need?

Stephen R. Covey famously said, "Begin with the end in mind" which suggests we should carefully consider the purpose of each training course we are offering. For example, nobody cares much (except perhaps the trainer) what someone learnt on a management course, but they do care how effective that person is as a manager after the course. Effective management is the end in mind. Think of other training topics and consider how important memorised knowledge is versus effective workplace behaviours. Of course, you can't really separate knowledge and behaviours in this way, but it's an interesting thought experiment.

Here is another thought experiment. Imagine that you learned a model on a training course about how to relate to other people. It was one of those four quadrant models, perhaps with colours; you know the ones. You saw the sense in it, and you saw how you could use it at work, so you did. Your behaviour changed and you got better results, so the training was a success! Or was it? Six months later, someone asks you the details of the model, and you can't remember. You aren't even sure what the colours were, but the behaviour changes you made have become habitual. You don't even have to think about them anymore. In other words, you have forgotten what you learned during training, but your new behaviour has been sustained. Did the training course work?

"Begin with the end in mind"

If a set of behaviours is our endpoint, we first need to define that set of behaviours, and then structure a journey for the learner so they can cross the gap that exists between their current behaviours and the desired behaviours. I use the metaphor of a journey here because behaviour change seldom happens instantaneously, and rarely happens in isolation. A number of factors need to come together over time to generate a new behaviour and embed it so that it is sustained.

What are those factors, and how do we 'deliver' them to a learner so their behaviour changes in the way that we want it to?

Define success

Steve Jobs said, "A lot of times, people don't know what they want until you show it to them. That's why I never rely on marketing research. Our task is to read things that are not yet on the page." COVID-19 forced us into new ways of working and showed us many new things that we now realise we want; the pages are being written. Henry Ford said something along similar lines, "If I had asked people what they wanted, they would have said faster horses…".

Steve Jobs said, "A lot of times, people don't know what they want until you show it to them."

When your customers are saying things like "move this training online", or "make this a two-day course", or "convert this training into elearning", or "make the horse go faster", take a step back and move the focus onto the desired end-point. Don't just take the order without question or examination of what your customer actually needs. What they want and what they actually need may be different, and it is your job as an L&D professional with integrity to find out. You need to ask questions to zero in on what would constitute success for the operational manager, and I can guarantee that success to them won't be "25 people logged into the elearning module" or "25 people attended the training session".

Many have termed this process performance consultancy, but really, it is only common sense to start with the end in mind. The managers want to meet their business outcomes and that means the people in their teams need to step up and perform effectively. They need to do things a certain way, probably differently than they are doing them now, to execute the operational strategy effectively. We have 'trained' our managers over the years so that when this performance gap arises, they ask for training. Training is what they want but we need to ensure it is what they really need before we deliver any training.

Our job is to uncover the real needs and make them visible. If those newly exposed needs are different to what the manager asked for, they will change their mind on what they want.

> *"Our job is to uncover the real needs and make them visible."*

At its simplest, you need to ask these three questions:

- What do you want people to start doing after training?
- What do you want people to stop doing after training?
- What do you want people to continue or accelerate doing after training?

Think of this as a Behavioural Needs Analysis (BNA) that culminates in a list of behaviours which you want people to start, stop or continue. These desired behavioural outcomes need to be specific, and observable so we can see if we have been successful. Here are some examples...

- Routinely prepare an agenda for meetings and ensure all invited attendees have the agenda and supporting documents at least 24 hours prior to the meeting.
- Add at least 20 invoices to the accounting system in 30 minutes without error.
- Conduct one-to-one meetings with all team members weekly.

The starting point for so many in L&D, after receiving a request, is a Training Needs Analysis (TNA) or a Learning Needs Analysis (LNA). I would suggest that if you do this, you have already fenced yourself into a corner because the presupposition behind both analyses is that training or learning will be required. Following a TNA or an LNA, most people start considering the curriculum and a list of content, and how they will deliver it in order to fulfil the needs they have uncovered. They have already lost sight of what they should be trying to do for the organisation. A BNA, on the other hand, does not fence you in and ensures that you are focused on the real prize, the behavioural change.

When you know the behaviours you want, you are forced to ask the better question, "How do I create those behaviours?"

A BNA is the first step. When it is done, and ONLY after it is done and uncovered a direct need for a learning intervention, should you start doing anything like a LNA. Performance consultancy should ALWAYS precede Learning Consultancy because it is the foundation for your learning design.

Another huge advantage of a BNA approach is that it connects you with the business in a way that means you can explain why you are doing what you are doing without resorting to jargon or L&D speak. It means a manager can make a direct cause > effect connection between a desired behaviour and a performance issue. "If behaviour 'abc' occurs, then my performance problem 'xyz' goes away. Let's get started! What do I need to do?"

> *"How do I create those behaviours?"*

Your definition of success might be one behaviour, or a list of several that are related. Agree with the operational manager that if the behaviours are achieved, they will get the performance results they want. You need to establish a clear line of sight between the desired behaviours and the desired operational outcomes. The manager needs to sign off on the behavioural outcomes because they are closer to the operational workflow and they should know what will work, and what won't. Besides, the operational outcomes are the responsibility of the manager. If you want to learn more about a practical performance diagnostics approach, I suggest that you read my book ***"Capability at Work"***.

Until you have defined success in terms of a list of desired behaviours, and performance standards to measure those behaviours, keep going. You need that list! Keep asking the question, "What does the employee have to DO to be successful?" Talk to the other stakeholders and get clarity on what everyone involved wants to happen after the training and what behaviours will support that outcome. Establish the causal link between the proposed behavioural changes and the operational outcomes. You now have a definition of success that you can use to measure your progress. Ask the question, "How will we know when the employee is doing what we want them to do?" Sometimes this will be because you can observe the behaviour directly, and other times it will be because you can see a direct effect of the behaviour, like a change in a KPI. After all, training value is only achieved when people use their new learning on the job and therefore perform better.

People often ask how they should measure training or learning success so they can justify the spend on L&D. This gets much easier when you start with a BNA. What tasks do you want the employee to do? What 'behaviours' do they need in their repertoire in order to do those tasks adequately? How will you know they are doing those behaviours? What will you see or hear? What evidence will be available to prove to you that the behaviours and/or tasks are being done adequately? Or not done?

How will you know they are doing those behaviours?

Thinking this way will give you a list of observable behaviours and observable measures. Agree with the programme requester/sponsor what the starting point is and what would be considered a successful outcome in terms of these behaviours and measures. When they sign this off, you have an agreed and measurable target for your programme.

There are many ways you can add finesse to this process. For example, you could ask the manager, "If the programme is 100% successful, how would you know and by when?" And again, "If it was only 50% successful, how would you know?" You need to get really clear on what success will look like to all the different stakeholders, including the learners. You do not want a hidden conflict of outcomes. The desired behavioural outcomes and the measures need to be common knowledge and 'signed off' by all the stakeholders. They should never be invisible or imposed.

When we talk about outcomes, it is inevitable that we also consider the ROI. So, consider this; if a manager wants to buy a new machine tool for their work area, they put together a business case and predict the ROI as part of that business case. It is their job to work out the commercial attractiveness of buying the machine tool, not the job of the machine tool vendor. It is also their job to manage the installation and implementation of the new tool into the production process to ensure the ROI occurs. The vendor can and often does help with this but if the ROI does not materialise because the manager chose to do the wrong thing, buy the wrong tool, or they didn't implement well, it is the manager who carries the can, not the vendor.

If that same manager buys some training as a service from L&D or an external training provider, where is the business case? Who has to prove the ROI? Who has to ensure effective implementation and that the ROI happens? Who carries the can if the ROI does not materialise?

Who carries the can if the ROI does not materialise?

You have done your BNA which means that you have a starting point, which is the current situation, and an end point that you are seeking to achieve. Only now should you start thinking about how you will travel the journey between your start and end points. Any journey planning you do before you have a defined destination is based on assumptions which can be wrong, and especially if based on old pre pandemic thinking, are likely to be wrong. Given the amount of change that has happened, and is still happening due to the virus, we need to go back to first principles and be incredibly careful when listening to our gut or indulging our instinctive responses. Remember, our gut has been trained by years of pre-COVID experience.

The journey

Look at each behaviour on your list in turn and decide what journey someone would need to go on to achieve adequate proficiency in that behaviour in their work context. In other words, what knowledge and skills would they need to gain and embed in order to be able to exhibit those behaviours reliably and even habitually?

What knowledge and skills are needed to enable the desired behaviours?

One obvious way to do this is to ask people who have already made the journey:

- How and why did the journey start and how long did it take?
- What was their starting point in terms of prior knowledge, skills and behaviour?
- What did they need to practice and how did they go about their practice?
- What did they need to know in order to start and continue their practice?
- What motivation did they need? That is, why did they think it was worth doing?
- Who helped them and what form did that help take?
- What was around them in their environment at the time that helped or hindered them?
- What would they advise someone else who wanted the same skills and behavioural abilities?

Be careful here when you are interviewing someone with unconscious competence. People with years of experience are often unaware of the amount of background knowledge and intuitive understanding they use to do what they do so well. They will have an answer for you, but it will be their attempt to logically deconstruct what they do and is likely to miss major components of their competence. It is called 'unconscious competence' for a reason. This is why you need to interview several exemplars and look for common themes so you can ignore the individual idiosyncrasies. You also need to interview people who are not yet so skilled and try to see where they have difficulty with a step that the experts find intuitive.

Another way to gather ideas is to ask people who want to make the journey what they think would enable them to make it right through to the end. Also, look back at previous initiatives that have successfully delivered the new behaviour and figure out what it was about those initiatives that worked. You are looking for evidenced behaviour change, and then unpicking what happened. It's important to get really critical about your evidence. If someone improves their report writing skills; was it really the course they went on, or a colleague who coached them? If someone took ten steps on their journey, were all the steps necessary or were some irrelevant while others were critical and made all the difference?

Look for the common factors so you can construct an ideal journey for someone to achieve proficiency in the new behaviour. Given your ideal journey, what should be in the package you need to deliver to them to enable them to start and complete a successful journey to their new behavioural destination?

What package do you need to deliver for a successful journey?

A good metaphor to use is the satnav. When you input a destination and follow the step-by-step instructions you will get to your destination. This depends on four factors:

1. The current location is known
2. The desired destination known

3. The step-by-step instructions are fit for purpose
4. You follow the instructions

These same four factors are critical success factors for your behavioural change journey.

L&D is already good at creating content in many different forms, from elearning to videos to workshops. What we are not so good at is what has to be wrapped around that content and delivered in the same package to ensure that the learning within the content is transferred into the desired new behaviours during the journey. To get this right, I would highly recommend the work of Dr Ina Weinbauer-Heidel and her 12 Levers of Transfer Effectiveness. The levers focus on three areas — the mindset of the trainee, the design of the program, and the workplace environment. They are adapted with her permission in the table below.

For successful learning transfer, and therefore successful behaviour change, you need to be paying attention to ALL these levers. One thing you will quickly realise when you look at the table is that some of the levers are outside your direct control. You will need help to pull them which means you will need to develop collaborative relationships with those who can pull the levers. In effect, some of what you need to deliver in your package for the journey has to be drop shipped from other suppliers.

The 12 Levers of Transfer Effectiveness

Levers for Trainees

(in the end, transfer is the trainee's decision)

1. Transfer Motivation – Yes, I want it!

Trainees say	"Yes, I want this!"
Definition	Transfer motivation is defined as the desire to implement what has been learned.
Guiding question	How can you ensure that trainees have a strong desire to put into practice what they have learned?

2. Self-Efficacy – Yes, I Can!

Trainees say	"Yes, I can!"
Definition	Self-efficacy describes the extent to which someone is convinced he or she can master acquired skills in practice.
Guiding question	How can you ensure that, after training, participants will believe in their ability to apply and master the skills they have acquired?

3. Transfer Volition – Achieving Transfer Success with Willpower

Trainees say	“Yes, I’ll stay on the ball and follow through!”
Definition	Transfer volition is the trainees’ willingness to dedicate their attention and energy to the implementation of transfer, even when there are obstacles and difficulties.
Guiding question	How can you help trainees develop the ability and willingness to persistently work on implementing their transfer plan?

Levers for Training Design

(design for transfer, not for applause at the end of the training)

4. Clarity of Expectations – Making Goals Transparent

Trainees say	“I know what I’m supposed to learn, and I want to learn it!”
Definition	Clarity of expectations is the extent to which trainees already know, before the training, what they can expect before, during, and after the training.
Guiding question	How can you make sure that trainees know what to expect before the training and what is expected from them as a result of the training?

5. Content Relevance – Learning What is Needed

Trainees say	“The content is practical and relevant to me!”
Definition	Content relevance is the extent to which trainees experience the training content as well-matched with the tasks and requirements of their work.
Guiding question	How do you ensure that trainees perceive the training content as relevant and important for their own day-to-day work?

6. Active Practice – Learning by Doing

Trainees say	"I have already experienced, practised, and tried it during training!"
Definition	Active practice in training is the extent to which training design provides opportunities to experience and practise new behaviours that are desirable in the work context.
Guiding question	How can you ensure that the action that is aspired to in practice is experienced, tried out, and practised as realistically as possible during training?

7. Transfer Planning – Step by Step to Implementation Success

Trainees say	"I know what I am going to do, step by step, after training!"
Definition	Transfer planning describes the extent to which the transfer is prepared in training.
Guiding question	How can you ensure that trainees prepare in detail while still in training to implement what they learn?

Levers for the Organisation

(the workplace can "untrain" people faster than we can train them)

8. Opportunities for Application – Everyday Work is Full of Possibilities

Trainees say	"It's possible for me to apply what I've learned to situations in my day-to-day work."
Definition	Opportunities for application reflect the extent to which the necessary situations and resources for application are available in the workplace.
Guiding question	How can you ensure that participants have the opportunity, permission, and assignments, plus the necessary resources to apply what they have learned?

9. Personal Transfer Capacity – We (Don't) Have the Time

Trainees say	"My working day allows me to take time to apply what I have learned."
Definition	Personal transfer capacity is the extent to which trainees have the capacity — in terms of time and workload — to successfully apply newly-learned skills.
Guiding question	How can you help ensure that trainees have enough time and capacity to apply what they have learned to their daily work?

10. Support from Supervisors – the Boss and Transfer Success

Trainees say	"My supervisor demands and encourages implementation."
Definition	Supervisor support is the extent to which trainees' supervisors actively demand, monitor, support and reinforce transfer.
Guiding question	How can you ensure that supervisors support, promote and demand the application of what trainees have learned?

11. Support from Peers – Other People's Influence

Trainees say	"My colleagues are backing me on implementing what I have learned."
Definition	Support from peers is the extent to which colleagues help trainees with transfer.
Guiding question	What can you do to encourage trainees' colleagues to welcome transfer and support it?

12. Transfer Expectations in the Organisation – Transfer Results as a New Finish Line

Trainees say	"People in the organisation notice when I (don't) apply what I have learned."
Definition	Transfer expectations in the organisation are the extent to which trainees expect positive consequences from applying what they've learned or the absence of negative consequences as a result of non-application.
Guiding question	How can you ensure that trainees' application (or not) of what they've learned is urgent, attracts attention in the organisation and has positive (or negative) consequences?

Adapted from a model by Dr Ina Weinbauer-Heidel (www.transfereffectiveness.com)

The delivery process

For most behavioural change outcomes you will find the package you design using the approach above will be a blend of many components; it will have content such as elearning or videos, contributions from a trainer, on-the-job practice with feedback, opportunities for discussion and collaboration, and significant manager involvement. It won't be a once and done event, virtual or otherwise.

Think back to something you do now differently to the way you used to do it. How do you do it now? If you don't yet do it naturally and easily, what still needs to happen so it becomes an unconscious and automatic response to the trigger conditions?

How did that change happen? Did you do it, or did someone else do it? You, of course! We can't change other people's behaviour. All we can do is set up conditions where they are more likely to create and embed a new behaviour within themselves. So, what are those conditions?

Think again how you changed your behaviour? What was the recipe? What were the ingredients, the inputs, and what was the process and timing? Input ingredients are things like motivation, experimentation, practice, a desired outcome, feedback, information, support from others, a starting point, understanding and many more. The process is a sequence of activities using the ingredients spread over time.

The inevitable outcome from your design process will be a programme consisting of activities that learners need to do over a period of time to achieve a predetermined outcome. This is a pretty good definition of a workflow. In effect, you are setting up an activities workflow within their day-to-day job where learners will step through a sequence of activities, and in doing so, they will successfully achieve the outcome which is the change in behaviour. Here is an example of a workflow you can use or modify for your delivery process. It is based on a regular cycle which has the following components...

1. Huddle
This is a 60 — 90 minute get together online where a facilitator helps a small cohort of learners review their activities during the previous week and sets up the activities for the next week. Think of this as a tutorial to help keep people on track.

2. Study
The learners go through the recommended content, or content they have found through research, to the extent that they need it in order to participate in the practice activities. Think of this as utilising the flipped classroom model.

3. Practice
The learners participate in 'deliberate practice' which refers to a special type of practice that is purposeful and systematic. While regular practice might include mindless repetitions, deliberate practice requires focused attention and is conducted with the specific goal of improving performance.

4. Feedback
The learners receive constructive feedback on their activities from a manager or peer, or from a measure they have put in place like a stopwatch, counter or selfie video. Feedback is a critical component of deliberate practice.

The name I am now using for this workflow is a 'Learning Workflow' and the more I think about learning workflows, the more I realise that you simply won't get behaviour change without a workflow approach of some sort. Even if you don't design a learning workflow into your training initiatives, the learners who do change their behaviour will have done so because they created their own workflow of multiple activities to transfer their learning into action. But why rely on the learner to do that? Most won't, and that is why training programmes have such a poor record for learning transfer.

Sure, it is possible to have a flash of insight like a road to Damascus conversion which changes behaviour immediately and forever. Indeed, the inception of a phobia often occurs this way where a single highly emotional experience, usually fearful, triggers a behaviour change which is sustained over the rest of the person's life. Nobody ever forgets to 'do' a phobia when the trigger context arises. There are people today who will still not swim in the ocean as a result of seeing the 1975 movie Jaws. Even though humans have the ability to learn this way, there are many reasons, some of them ethical, that make it difficult to use this kind of conditioning in an organisational learning context.

So, we have to take the longer route and use a learning workflow. There is no other option that will get us to our outcome of behaviour change. We have to completely let go of the seductive idea that we can reliably achieve tangible behaviour change with event-based learning initiatives and focus instead on programmes that consist of a learning workflow.

> *"We have to let go of the idea that we can achieve behaviour change with event-based learning."*

Disambiguation: (what a great word!) People often talk about learning in the flow of work, or workflow learning and that is different. When I talk about a 'Learning Workflow' I mean a sequence of actions in a predefined order, typically against a schedule and with a defined learning outcome. The outcomes from that sequence of actions could be behavioural change, a qualification, an onboarded new starter, and indeed anything where L&D needs to take people through a sequence of actions.

Where do the learners most often do these actions? In their day-to-day work. Their day-to-day work usually consists of multiple processes either designed or ad hoc. For example, tracking down an errant customer delivery, answering a query about an invoice, ordering a new batch of widgets. These processes are the workflows they use to get their job done. The summation of all these concurrent workflows and ad hoc stuff is often called 'the workflow' as a high-level term, or the flow of work.

So, when they engage with a 'learning workflow', they are adding another workflow to their current batch of workflows. They are following a specific learning workflow sequence within their day-to-day workflow. That is, they are learning in the flow of work using a learning workflow.

Learning cycles

A weekly cycle works well. A week is enough time for learners to do the activities and not so long that the programme loses momentum. It fits with the weekly operational rhythm that is common in most organisations and is therefore less disruptive. It also works well to set a consistent time for cohort activities, for example, the group call is always at 15:00 on a Wednesday; this sets expectations for colleagues for when the learner is unavailable for other duties. Another advantage of a regular weekly cycle is that it promotes a culture of regular learning. Learning, and interacting with a manager and peers about learning, becomes an integral part of work rather than something separate that is done 'over there' in a classroom, virtual or real.

The number of cycles will depend on how much time all the activities on the programme will take an average learner to complete, divided by the amount of time they can dedicate to doing those activities each week. Building skills with practice, and repeating activities frequently enough to start creating habits does take time, so avoid the temptation to rush a programme. 'Little and often' is a better mantra than 'get it over with'. We want learners to digest new ideas, experiment with them, and then develop their skills and apply them as behaviours in their work; your programme will fail without giving them time to do this.

> "Little and often *is a better mantra than* get it over with."

When you are designing your learning cycles, look for a natural chronological build order for the skills. How do the skills you want to see in your learners build on each other over time, and when do you need to cycle back to repeat the practice of a skill to reinforce it at a higher level, or practice two skills together? Sometimes it is better to practice a single skill in isolation, and other times it is better to practice several skills together in the way they might be required in the real work context. Mix it up. Think of practising elements of a golf swing, then bringing them together, or elements of a sales conversation, then bringing them together.

Also, look to get a sense of balance across the cycles. Design them so that both the activity load and the cognitive load are similar across cycles. We are not used to doing this in a classroom. In traditional training, we often just cram in as much as possible over the days we have them in their seats. Chunking and load balancing over time is a new thing we have to learn to do.

It is essential that you get agreement from line managers for your new cyclic approach, and you should reinforce this with the support of a senior executive sponsor. Talk through the logic of your design process with them and encourage their participation in the design. You need their buy in because any resistance from them will kill your programme. Arguably, since so much of the programme is happening on their watch out there in the workflow, you need their support more than you ever did. They need to be comfortable that the programme delivery will not impact productivity more than they are prepared to put up with in relation to the potential gains they see from the programme. There must be an ROI from their perspective. What are they investing and what are they getting in return? You need to articulate this and sell it to them.

Huddle

The huddle is where your learners get together online to share ideas and insights, and any issues they have with the practice activities or programme content. The facilitator is there to guide the discussion, acknowledge the thoughts and feelings of the learners, address concerns, and highlight positive takeaways from the learning intervals. It is also an opportunity for the facilitator to provide course correction if people are getting off track. Frequent course correction is far better than telling someone they missed the target when they get to the end.

> *"Frequent course correction is better than telling someone when they get to the end."*

Keep the number of learners in a huddle session to ten or less. Any more than ten and it becomes difficult to have a free-flowing conversation where all your learners get the chance to contribute. You could invite along a line manager, or perhaps a subject matter expert, to all or part of each huddle session to give their perspective and answer questions. A well-run huddle will have a lot of great information so people should be taking notes, and should set aside 15 minutes after it finishes to reflect on what they have learned and how they will apply it during their upcoming practice activities. In fact, that reflection after a huddle should be one of the mandated activities.

People debate the value of taking notes when a session is being recorded and you can always go back to it. The other debate is whether you should handwrite your notes or type them directly into a laptop. What do you think?

Plenty of research shows that handwriting notes works better for comprehension and retention than typing them during the session. This is particularly true for those who can touch type fast enough to record the event verbatim. When handwriting, the way we have to process and summarise the incoming information, and then transfer it to written notes on a page is much more immersive and works differently to the way we do it when typing. Personally, I prefer to handwrite notes and then within a few hours review them, sort out what was important and what further thoughts have occurred to me, and then transfer them onto my computer.

By the way, you don't have to call it a 'huddle', but branding is important. Be careful what you do call the session as the name will set expectations and maybe drag along legacy baggage. What do you think of when I say webinar, or virtual classroom, or distance learning? I wouldn't use those or similar words where people will make assumptions and have a preconceived idea of what the session will be like.

It will be tempting for the instructors among us to put the huddle on a pedestal. You need to resist this temptation because the huddle is not 'better' than other activities in the learning workflow. Instructor presence in a synchronous session is not a prerequisite for behaviour change. Think of group time with an instructor as expensive time, so use it only where it provides clear benefits that are worth the expense and cannot be achieved more 'cheaply' by other means.

This ebook is not a 'how-to' on facilitating a virtual session. There are people far more skilled than I in online facilitation and I would recommend getting help with how to run a session that generates engagement. A skilled classroom trainer who runs an online session for the first time is like an athlete being busted back to being a toddler. It is uncomfortable and feels very unstable because anything can go wrong, and it will. There is a lot to learn, and you can't rely on the unconscious competence you developed in the physical classroom. You are thrown back to conscious incompetence, and you need practice. A good face-to-face instructor can be very boring online when they can't interact with learners in the way they are used to and their honed ability to improvise interactions in the classroom no longer works for them.

And of course, a huddle does not have to be online. If you have the luxury of choice, focus on whatever would be most effective within the learning workflow that you are designing, and efficient in terms of time and cost. You might even use a hybrid approach; it is not an either-or choice. If you do use a physical classroom for your huddle, be very careful that you don't drop back into your physical classroom habits as a trainer. The huddle requires careful facilitation. It is absolutely NOT a training event.

"The huddle is NOT a training event."

The interactions are important. It's easy to underestimate the power of group learning, sharing ideas, learning from the experience of others, and getting feedback from peers. The huddle adds a human dimension, networking, ideas synergy, free flowing dialogue, emotion, and a sense of belonging. It also adds a regular check-in point so that people will feel some sense of social pressure to be ready with any 'homework' they have been tasked with. Nobody wants to be last. You can certainly run a programme without synchronous cohort activities like a huddle, but given the benefits of sharing while people build new behaviours, think twice before you do.

Study

What does the learner need to know in order to do what they need to do? Write a list. Now step back. It is almost certain your list is far longer than it needs to be. Our natural inclination, and that of our subject matter experts, is that more knowledge is better. After all, what harm can it do?

Think back to the last workshop, webinar, or training course you attended. How much of what was presented do you remember? Chances are, you only remember the bits that you have subsequently used, or a story that resonated with you at the time. What other bits of information do you remember and why those bits?

Let's start a new list. Given the skill you want people to practice so it is readily available as input to the behaviours you want, what would you put on your list as the bare minimum knowledge required for someone to start practising the skill at a basic level? As your learners go through the programme and start practicing the skill at a higher level, how much more will they need to know as they progress? Next, consider at what point along the programme timeline that knowledge will be required to support the skill practice?

> *"What's the minimum they need to know in order to practise the required skills?"*

Notice how different this approach is to the normal way you would approach the design of a traditional face-to-face training course as you move away from event-based thinking towards a timeline approach.

It's also worth considering what your learners know already and how you can guide them to what they actually need that is new to them. Your goal is not to push them to go through all the content you have available for the programme; your goal is to help them change their behaviour. They learn in order to do stuff. The study part of each cycle is only there to support the doing. Think about your content as supporting and enabling knowledge, rather than essential knowledge. If they can do the behaviour acceptably and yet not fully understand the model it is based on, who cares? Sure, some learners might take a more wide-ranging approach to the content they consume, so by all means make extra material available or suggest how they can discover it for themselves, but don't make it mandatory.

Limiting your content to what learners must have in order to start and continue practicing a skill helps ensure that your content is directly relevant. This relevancy must be from the perspective of the learner, and in order for that to be the case, they must see the skill itself as relevant and useful in their current or future job role. If they don't think the content is relevant, but you are convinced that it is, you need to sell them on its relevancy. Force-feeding content to someone who thinks it is not useful is doomed to failure.

> *"The learner must see the skill and the underpinning knowledge as relevant."*

You may put a lot of store in the old adage, "You can take a horse to water, but you can't make it drink." This is true until you realise that you can put salt in the horse's oats. A thirsty horse will always drink and one of the best ways to salt the oats for your learners is to tell stories that establish the relevancy of your programme to them.

When developing content for the study parts of a programme you should consider how learners might need that content after the programme as ongoing performance support. Imagine scenarios soon after and long after the programme when the learners will need support with their new skills. In each scenario, what do they need, and what would be the best way to provide it to them? You should be creating ongoing performance support materials anyway, so as far as possible, use these during the programme as well. They will learn how to use the support materials, it will save you time, and also reinforces the fact that the content is about supporting behaviours and performance, not just something to be consumed for its own sake.

Practice

One way to think of practice is as the engine room of behaviour change. Without practice, new behaviours won't come into being, and the old behaviours and habits will continue. If you want people to do things differently and develop new habits, practice is essential. Consuming content so that we know something does not mean we make use of what we know. There is the all too familiar knowing-doing gap. For example, how many of us eat and exercise in the way that we know we should?

For most of us, practice means doing something as many times as we need to in order to get it right. For some, that means more or less mindless repetition, but for those who know better there is a way to make practice far more effective. In 1993, K. Anders Ericsson and colleagues published the results of their research into practice within the context of musical training and coined the term 'deliberate practice'. They found that, when it comes to practice, both quality and quantity mattered when building expertise and one was not much good without the other.

> *"When it comes to practice, both quality and quantity matter."*

There has been much research since, and many of these studies were compiled in The Cambridge Handbook of Expertise and Expert Performance, published in 2006 by Cambridge University Press. The 900-page-plus handbook includes contributions from more than 100 leading scientists who have studied expertise and top performance in a wide variety of domains: surgery, acting, chess, writing, computer programming, ballet, music, aviation, firefighting, and many others. Consistently and overwhelmingly, the evidence showed that experts are always made, not born, and the pathway to expertise is quality practice that is structured a certain way.

Not all practice makes perfect. You need a particular kind of practice to develop expertise. When most people practice, they focus on the things they already know how to do which does not help them do new things. Deliberate practice is different. It entails considerable, specific, and sustained efforts to do something you can't do well — or even at all. Research across domains shows that it is only by working at what you can't do that you turn into the expert you want to become.

Deliberate practice involves two kinds of learning: improving the skills you already have and extending the reach and range of your skills. However, it takes effort, and therefore motivation. As the golf champion Sam Snead once put it, "It is only human nature to want to practice what you can already do well, since it's a hell of a lot less work and a hell of a lot more fun."

Some of the hallmarks of deliberate practice are:

1. Planned sessions
2. Focussed intensity on a specific outcome for the session
3. Assessment through feedback and/or measurement to judge success and progress
4. Repetition of the deconstructed components of a skill
5. Reflection on results with a view to further improvement in the next session
6. Ongoing deliberate practice, long after the skill is established to combat skills fade and habitual familiarity

An obvious prerequisite for effective skills practice is that the learner must know what good looks like at different stages of the journey towards the desired level of expertise.

Therefore, a definition of 'good' and how to assess it needs to be in the study content.

Learning is not just sharing certainty from the people who know to the people who don't. That is called knowledge transfer and indeed, in some cases that may be all that is required, in which case you probably don't need a learning workflow. It gets messy when the certainty is not easily transferable. This happens because the topic is complex and is dependent on the individual and their own context. It also gets messy because there is always the prospect of disturbance when people are learning. That disturbance leads to disquiet, anxiety, loss of what was, and hopefully, excitement for what could be. To overcome the inevitable messiness, people need to practice and experiment, and also tackle their uncertainty collectively and collaboratively. Resolving that uncertainty takes time and flows better with guided activities, either solo or in a group.

The learner's day to day workflow provides rich opportunities for meaningful practice using real-life examples that are immediately relevant. These opportunities should be seized as they occur, but you should go beyond this to planned and structured deliberate practice. For example, a novice radiographer might work with a senior colleague five times a week to assess x-rays for a specific ailment and receive feedback and coaching. Imagine instead if we gave the novice radiographer 100 x-rays to assess from historical cases where this ailment was suspected, and the true outcome was known. Their target might be assessing those 100 x-rays with 80% accuracy. Then they can get feedback from their mentor on the ones they got wrong, or the ones that were uncertain from their less experienced perspective. In other words, are there ways you can generate experience more quickly than that provided by their normal day-to-day working activities?

"How can you accelerate experience?"

When utilising practice opportunities in the day-to-day workflow it is important that these are managed for risk. A novice will likely make more mistakes and take longer to do a given task. Consider how the local line manager can 'insure' the activity and how closely they would need to be involved and informed to manage the risk. Consider also how much support the local line manager will need to give in terms of delegating tasks to make practice opportunities available and being present to help where needed if the practice goes wrong.

Given the new skill is relevant to the learner, and it should be, learners will be able to find their own opportunities to practice as they go about their day-to-day activities. If opportunities to practice are not readily available and unlikely to become available, is the skill actually relevant for that particular learner? Do they really need this skill now?

Feedback

Without feedback, practice is merely mindless repetition. Feedback is the fuel for improvement and if you cannot measure something, you cannot improve it. Ken Blanchard went so far as to say, "Feedback is the breakfast of champions."

As stated above, feedback is an inherent part of deliberate practice, but it is worth pulling out as a separate part of the programme cycle because it is so important. One of the key figures in the feedback part of the cycle is typically the line manager, and yet many line managers are reluctant or have no place in their schedule for developing team members. This is really a cultural issue. If those line managers are asked ten times about the business KPIs, but never about training or development of their team, the silence is deafening.

For decades staff development has been taken away from line managers and delegated to the classroom. Perhaps this was a mistake as we have reduced the involvement of line managers and reduced their ability to coach their people. When we consider that roughly 90% of learning (according to the 70:20:10 model) occurs on the job, it's obvious we should bring line managers back into play. If 90% of learning is happening in the flow of work, line managers absolutely need to be involved, especially if we are delivering our programmes remotely and the majority of the programme activities are being done on the manager's watch.

We need more than just permission from the managers; we need direct involvement, and dare I say it, passionate involvement. For this to happen, they need a clear line of sight between the programme and the benefits they will get as the team leader. How can you convert it from a should do to a must do?

Having said that, feedback can come from many places other than the local line manager. Feedback could come from more experienced colleagues, subject matter experts, coaches, other learners within the cohort — indeed, anyone the learners share their experiences with. The other place we get feedback from is direct measurement of our results. In the x-ray example used earlier, what percentage of x-ray assessments did the learner get right? Then, as the new skill gets introduced into the flow of work, we start to see feedback from the destination environment. As the learner starts to behave in a new way, how does the system around them respond?

We want feedback for the learners to allow them to improve their practice, but we also want feedback for ourselves so that we have measures in place to understand what is happening. We need feedback on how well the programme is doing so we can improve it. Don't expect to get it right first time. Creating a blended programme of this type is an iterative process.

Welcome session

Reserve the first huddle in your programme for orientation and setting expectations. Alongside the obvious need to ensure the technology works for everyone and they know how to participate, you also want to establish the group as a group of people who will be working together for mutual benefit.

Before the first huddle, a lot should have happened so the learners enter the huddle motivated to participate. Nevertheless, this is a great time to 'resell' the programme and pull many of the levers in the 12 Levers model above. To help with this, consider including some managers or a previous course participant for part of the first session to tell their stories and 'add salt to the oats'.

Wrap up session

During the last group session, you have a tricky balancing act to achieve. It is obvious that the programme is coming to an end, and you need to balance the cessation of the formal programme activities with the need for them to continue practising and learning as their journey continues. If you give people a strong sense of closure, for example by giving them a completion certificate, you are sending the signal that there's nothing more to do. Instead, the signal you need to send is that there is indeed more to do so people keep improving and combat skills fade. One way you can do this is to set up some measurement that will take place in a few months' time. Another way is to tie the output from the programme into the performance review system.

Technology

These days it's obvious that technology will play a significant role as a delivery channel. So, let's list out what you might need to deliver...

1. Online or hybrid facilitated sessions for your huddles
2. Online content such as elearning, videos, and documents
3. Ongoing performance support after the programme
4. Instructions for tasks and activities
5. Questionnaires and measures
6. Reminders and nudges when tasks are overdue

7. An online forum for asynchronous collaboration and sharing
8. Messaging related to the programme

There could be other deliverables depending on how you design your programme, but you get the idea. In addition to whatever online meetings tool your learners are most comfortable with you will need an online workbook that guides them through the activities they need to do when they need to do them, and trigger reminders when they don't do them.

Much of the success of any programme hinges on holding people accountable for doing the tasks that they are set, whether that task is doing some elearning, practising a specific skill, attending a huddle, or completing an activity like an assignment. You will find it difficult to manage a programme successfully if there are no consequences for inactivity and no way to track participation in all the activities within the programme.

"The success of any programme hinges on holding people accountable for doing the tasks that they are set."

It's all very well saying we want self-directed and self-sufficient learners and we should stop spoon feeding them learning. The problem is that in many organisations, learners have become so accustomed to the spoon that we have to maintain some element of planned delivery to wean them off the spoon gradually. For remote delivery, we can't just give them a list of tasks and expect them to get on with working their way down the list.

You could track the activities in a spreadsheet for each learner and set up some email templates for the different messages and notifications that need to be sent, and then call them regularly to check on whether they have done what was asked; or you could use a workflow application. Think about it — if a programme lasts for 12 weeks with just 5 small activities every week, that is 60 activities to track for one learner and 600 for a cohort of 10 learners! You definitely need digital help in the form of a workflow tool that will manage the delivery of a sequence of activities spread over time and automate the reminders and other interactions.

It's possible, though most unlikely, that your Learning Management System has this kind of workflow tool built in. Instead, you could run our People Alchemy platform alongside your LMS, or standalone if you have no LMS, to handle the digital delivery of your programme. Ask us for a demo so you can see what is possible with this kind of learning workflow delivery platform.

Last word

Early on in this ebook I said the real question to answer is, "How can we deliver behaviour change?"

I will let you into a little secret. This was always the question, but we very seldom asked it. In a way, nothing has changed, but everything has changed. Prior to COVID-19, we delivered the training course then, like Elvis, we left the building. The delegates went back to their jobs, and we moved on to the next training course.

We always should have been asking how to encourage behaviour change when we were no longer present, but we didn't. It always was about remote delivery of behaviour change. The pandemic has given us an opportunity to see that L&D can be done in different ways beyond the training room. Now we need to take that step back and fix our past errors.

"How can we deliver behaviour change?" That question is the key to successful learning transfer and therefore the key to effective training that has tangible business impact.

Thanks for reading this ebook. I hope you found it useful.

You got this far which means you are keen to find new ideas and new ways of delivering training to get better results.

I can help you.

What is your goal? What do you want to achieve?

Let's talk about it :-)

Paul

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