LEARNING Perspectives 2011

The MASIE Center
An Open Source eBook

Featuring:
Learning 2011's Under 30 Learning Perspectives
Checklists & Learning- Bob Baker, MASIE CLO
Learning Out Of Control - Nigel Paine, Masie Learning Fellow
We Are Not That Different - Elliott Masie

Edited by: Meghan Cernera
Brooke Thomas-Record
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Table of Contents

Learning Perspectives 2011

Welcome to our latest eBook, *Learning Perspectives 2011*. We are publishing this book in conjunction with Learning 2011 to extend the conversation about the future of learning and reflect on a wide range of views and experiences.

This year, we've reached out to the 30 Under 30 Team for Learning 2011, a group of rising learning leaders in their twenties, to write short articles on how they view the changing world of learning. We are proud to include 25 of those articles that cover the map from training tips to technology trends.

In addition, the new Chief Learning Officer of The MASIE Center & Learning CONSORTIUM, Bob Baker, has developed a provocative perspective on how *The Checklist Manifesto* might be applied to the world of learning and development. Clearly, checklists can play a critical role in how organizations push for quality and eliminate costly errors. Bob's article will stimulate great conversations at Learning 2011 and in the field about the future of checklists for performance and, in particular, within a Workplace GPS model.

Also, Nigel Paine, one of our MASIE Learning Fellows, has written an essay entitled "Why Learning is Out of Control in Most Successful Companies". Nigel's perspectives on learning are read around the world, and he continues to add value to the dialogue about changing issues in our field.

Lastly, I started to write an article about 7 Learning Challenges and TRENDS, but since I recently hosted an in-depth webinar on the topic, I decided to skip that article and simply include the link to the online archive: http://www.learning2011.com/challenges. I've also added a recent call to action to bridge the gaps between the learning worlds of K-12, higher education and workplace learning.

We hope you enjoy this eBook. Please check out more content from Learning 2011 as we post it on http://www.learningwiki.com in the weeks ahead.

Yours in learning,

Elliott Masie
Chair, The Learning CONSORTIUM
CEO, The MASIE Center

Living in a Box?

Jessica Sion, Disney ABC Television Group

Who likes living in a box? And yet, there are so many identities that we have nowadays that force us into those boxes: generations, personality style, communication style …the list goes on.

To be honest, I am the first to raise my hand and participate in a self-assessment, whether it is validated, such as Meyer-Briggs, or it is in a magazine as I am waiting in line at the market. However, I have a love/hate relationship with the idea of generations, communication styles, or personality styles. On the one hand, I am fascinated by them and will wait impatiently for any results that will tell me about myself. On the other hand, I do not like being placed into a box. Who does?

There are 4 generations in the workforce today. There are 4 communication styles described in the communication course I facilitate to our employees. Let's not even start talking about Meyer's-Briggs, which luckily there are 16 personality types but there also 4 dichotomies.

I appreciate the way our brains work by putting ideas and people into boxes that make it easier for us to quickly decipher if someone or something is friend or foe.

I don't know about you, but I don't always fit nicely into boxes. I don't share all the characteristics of my generation, and it's actually something I like about myself. I don't own an iPad (although I will gladly accept one if you're giving them away). My friends laugh at me because I am so slow at text messaging. I still write most of my text messages in full sentences and am a grammar snob. However, I do resonate with the fact that we need technology in our lives and need to make technology work with us, rather than us working for the technology. Our generation is also characterized as being motivated by meaningful work, a trait which I align with.

My communication style is analytical, systematic or logical, depending on semantics. However, I love being entertained by a good story, and my favorite part of what I do is relating and interacting with our employees.

In addition, as part of my Master's Program, I had the opportunity to complete the MBTI Step II Indicator and learned that I am an enthusiastic introvert, which made my day. If you know me, you know I am an introvert and want to know all about you in one-on-one settings, but I have this wild side that shocks my friends every once in a while. I have to admit, I love that side!

Each of us is an individual and I would love to see learning programs developed while taking into account the individual instead of the group.

So I am a millennial/gen Y, enthusiastic introvert, systematic communicator, who loves a good story, and a libra! In a nutshell, we all need to do a better job of asking questions of others to truly find out who they are and why they do what they do. I am looking forward to meeting all of you at the conference and discussing if and/or how you fit in with your generation, personality style, communication style or astrological sign.

Jessica Sion currently works as an Analyst in the Learning & Development department at the Disney ABC Television Group, part of The Walt Disney Company. She will be completing her M.A. in Organizational Management from Antioch University Los Angeles in the spring and received her B.A. in Communications from the University of California, Davis.

Worst Trainer of the Year: 5 Easy Ways to Win the Award

Karen Hanson, Medica

There are many ways to go about polishing your facilitation and instructional design skills to win the coveted "Worst Trainer of the Year" award. Here are 5 quick and simple tips to guarantee your win!

1. Go with the flow. Instead of spending time preparing your material and searching for the next great quote or example, be spontaneous. Trainees will appreciate watching the process of how you work and how you are able to come up with thoughts and ideas on the fly.

2. Practice reading PowerPoint slides. Audience members enjoy having presentations read to them, so that they don't need to read it for themselves. It's best not to have details potentially lost in translation. Practice "being green" by minimizing your presentation's font size and maximizing the amount of information on each slide.

3. Theory, theory, theory. Participants will take you seriously only if you provide them with all of the research to back up the theories that you are providing to them. Don't waste time on real-life examples when you can create hypothetical situations to explain your material. Avoid telling stories to illustrate your point. Attendees might find them too engaging and focus on them, when instead they should be concentrating on memorizing facts and figures.

4. Take the time to explain all the details to your audience, no matter whether it relates to their job or not. After all, they might need to know about it later on, down the road. It's best not to assume that they have experience in the subject matter you are training about. Give them all the information that they might need to know, while you have their attention. If you are training a technical computer system, explain and have a discussion about each and every button, window and field that appears. It's best not to leave anything out. Your trainees will appreciate your painstaking attention to detail.

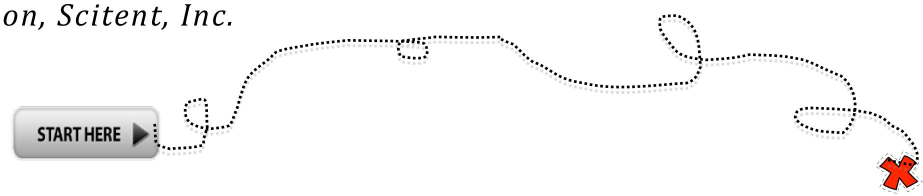
5. Speak in a slow and even tone. Participants might find loud and over-enthusiastic tones to be jarring. Try to keep your volume low and your pace controlled. You will know you are successful if your audience members embrace the full experience of your presentation by closing their eyes.

If you snag the award, it's likely that word about your skills will spread quickly and you might soon see an impact on your attendance levels. But have no fear, facilitating fewer classes will free up more quality time to work on winning this award again for next year.

Karen Hanson is a Minneapolis-based Professional & Technical Trainer. A passionate classroom instructor, Karen enjoys on-boarding new hires and training technical systems-based classes. Originally from Malaysia, she relocated to Minnesota to attend college. Karen holds a bachelor's degree in Business Administration- Marketing & Management Information Systems and an MBA. She lives with her husband Bryan and their two children, Sophie and Jack. Her favorite food is mac and cheese (the real stuff, not the bright orange kind).

The eLearning Destination

Rachel Harmon, Scitent, Inc.



The idea of an eLearning destination seems odd to me; effective eLearning is an experience. eLearning is a combination of strategically designed and motivational attention-grabbers, challenging brain stimulators based in theory, retention exercises, and multiple principles of design. Using the word "destination" implies that the learning stops somewhere. When I begin designing an eLearning exercise, one of the first items I consider is the overall goal of the project. The concept of a goal suggests that there must be an end, something attainable. However, my professional goal and part of my mission is to create instruction that extends beyond the computer screen. I want content to be applied in the performance context, not just within the learning context. Does the learning really stop or does the destination change as the learner grows and adapts?

How can we ensure the knowledge acquired online will transfer beyond the computer screen into real life professional practices? My belief is that several factors contribute to the likelihood of extending the application of content into the performance context, including incorporating real-life examples, extension activities, and longer access to exercise material for review and reflection purposes.

Real-life examples are key when drafting content for an online environment. Designers must prepare and share the examples in a way that is relatable to the performance context, or actual professional location of the end-user. For example, if the end-user is an ER nurse and is renewing his CPR certification with an online course, then provide hospital environment examples that relate to the experiences of someone in this profession. A subject matter expert comes in handy here and can help guide that part of the exercise.

Incorporating an external resource extension in an online exercise is probably one of the easiest learning tools to set up. The hard part is finding reliable URLs from which to link. One of the most valuable pieces of information I picked up in my 20's is the ubiquitous nature of the portable document format (PDF) file. Email your resume as a PDF; scan your file in as a PDF, link to a PDF! The PDF file is a key tool when linking to resources that could potentially change over time, if not in a more stable environment. These extension activities allow the end user to bookmark information outside of the eLearning environment for future use.

Lastly, allowing access to online content for longer periods of time increases the probability that an end user will refer to the online exercise after experiencing something similar in the work place. This comes full circle, back to the importance of integrating good examples and non-examples into instruction. By incorporating all of these characteristics, we are creating learning that goes beyond the computer screen. The destination becomes real life.

Rachel Harmon is the lead instructional designer at Scitent Inc., based in Charlottesville, Virginia. She received a B.S. in Middle Childhood Education with a specialization in language arts and social studies from Miami University (Ohio) and is currently certified to teach grades 4-9. In December 2009, Rachel received an M.Ed. in Instructional Design and Technology from Virginia Polytechnic Institute and State University. Rachel enjoys designing eLearning for the healthcare industry and the K12 atmosphere; her positive attitude and outlook on learning has morphed into a passion for educating people all over the world using the technology at their fingertips.

The Human Element of Technology Integration in Learning

Zack Rhoades, AB SCIEX

Whenever I skim conference sessions for new instructional tools, the common theme is often on how to utilize technology to make learning delivery faster and easier. But in implementing new tools, we risk losing some of the human interaction that is critical to the learning process. Poor implementation could potentially detract from the connection that occurs during learning and make the experience less meaningful. If not integrated properly, these are valid criticisms; however, new communication tools do have the ability to improve the learning experience, but only if we keep the personal connection intact.

The extreme scenario of a full replacement of human interaction with technology would be a sterile environment where learners are attached to devices and pumped full of information. **People do not learn effectively in this way.** The lack of human interaction, imagination, and integration of new viewpoints is linked to overall poor effects on retention of material and on general behavioral health. It results in an antiseptic learning environment that proves hostile to new ideas. The human side of education cannot be replicated. If we instead take technology and utilize it to make learning more engaging, then we can push learners toward making real connections rather than using technology to substitute for meaningful connections.

Fortunately, we are at the forefront of a major technological movement. Mobile technologies are more economically viable for utilization in learning environments than ever before. Where cost was a big factor in widespread implementation, recent reductions increase their broad reach. That said, only tools that allow us to keep the human association will truly enhance learning and make this type of distance learning through mobile technology more effective. From social networks to new software platforms, we have more tools than ever to integrate distance learning and make education even more accessible; however, just using these tools for the sake of using them does not actually enhance learning. There still is a need for building a deliberate instructional framework which would highlight human interaction **in the scope** of these tools.

For example, take an analytical science group within a pharmaceutical company. The industry currently relies on technology for a variety of activities: from robots that automate human laboratory tasks and streamline routine processes to data sharing functions which can be integrated for increased compliance and safety issues. These tools are even used for advanced analytics and to perform decision making. So why haven't we been as successful in fully automating the education and instructional delivery process? Although we can utilize technologies to increase basic interactivity, we still need the nuance of human interaction to develop and review content. We need a person to identify when someone is having difficulty, signaled with a furrowed brow or an uneasy glance, and make a plan of action to manage the issue.

Although we cannot fully replace a person with technological advances (not yet anyway), we can utilize communication tools to enhance the learning process. The leading drivers for this come from three main components of human connectivity in learning:

> **Emotion:** When designing learning programs, an emotional connection functions to create enthusiasm and highlight major ideas. If you can connect directly with an audience, you can create a solid bond which will increase retention and learning.
>
> **Flexibility:** Flexibility comes into play when you need to make quick modifications to a lesson. It's really easy to evaluate a skill set of a group of people when you are interacting with them and, if needed, make modifications to a learning plan, highlighting different topics. We can attempt this with eLearning but the development effort is much more difficult, without a huge increase in quality.

Personality: The specialty of showing a particular personality trait can often be one of our strongest assets as educators. Some of us are funny, some are more academic and others are sarcastic - all of which make us unique instructors. Having these different personalities (often delivering the same information in different ways) can make for a much more enhanced learning environment. It's these ideas that make the human element even more important.

If integrated correctly, we can utilize new technologies to promote these ideas. Emotional exchanges through thoughts and feelings rather than through the regurgitation of facts can make a stronger connection and create enthusiasm in your learners. The insertion of conversation, dialogue and targeted multi-tasking can even add new dimensions to learning environments.

The major criticism of the younger generation of learners is in the lack of desire for human interaction. The caricature of a couple sitting with their laptops on their couch, Facebook Messaging each other rather than talking has unfortunately clouded the discourse in learning technology. I actually believe that the reverse of this stereotype is true. Human connectivity has been redefined and expanded by younger generations, and we can utilize this fact when designing eLearning in a corporate or educational sphere. Although we may not use technology more than other industries, I feel **we utilize technology in a different way,** one that actually provides easier access for connectivity and strengthens bonds between instructors and learners.

Rather than holding half-day training sessions or seminars where people have to travel in order to meet, we can use a web conference that brings together a larger group of people. Ideas from different sites or countries can be integrated instantaneously; learning can be even broader in scope. We can gather subject matter experts with a variety of skill sets and create human connections that we were unable to create before. This human scope of connectivity is a desire to learn new things - not just to parcel them out in the realm of electronic media.

We need connectivity. We crave it!

At present, we have the ability to produce multi-modal learning, where an expert in a particular subject can introduce workflows of a software package while chat rooms are set up, so that learners can share additional cases or processes for which they use the software. In the pharmaceutical industry, a discussion of regulatory requirements with the addition of compliance experts alongside the discussion, working through case studies with the understanding that only a person can provide, can actually increase retention and exposure to new ideas.

Ultimately, in order for these technologies to be successful we need to integrate new tools without removing the human element in our learning activities. They can work together in a very effective way if brought forth intelligently. We need to keep in mind that sacrificing human interaction just to expedite the dumping of information into an automated process will lead to the failure of a learning program. If we get this balance right, we are opening ourselves up to a new realm of learning where we can truly make electronic delivery of training more interesting, education more fluid and targeted to specific audiences, and bring a greater number of people together in a more effective way.

Zack Rhoades works as Senior Specialist, Technical Training at AB SCIEX and has a variety of experience in the life science technology, software, biotechnology and non-profit research industries. He has an academic background in analytical chemistry and holds a master's degree in Instructional Design. He has a passion for learning, teaching and travelling. He currently resides in San Francisco, CA.

Being Patient with the Impatient

Amy Bean, Summit Financial Group

Starting from the early days of our youth, we have always been told "be patient" and "all good things come to those who wait." Well, for some of us that stuck, and for some of us it did not.

Patience is a virtue, and to be honest, one that I actually used to struggle with. Through time, I have learned to work on those issues, but I've found that when I train someone who is impatient, it is hard for us both. I'm sure many training professionals have had that trainee who keeps clicking the mouse while pages are loading and the one who asks every question that will be answered by the end of the session. These trainees tend to make us all unravel. In the following paragraphs I'll divulge a few tricks of the trade I've come across to help everyone handle the questioning, clicking, and impatient trainee.

First, it is imperative to understand the situation. Ask yourself a few questions before becoming frustrated at the trainee: Is the employee nervous, and what could be making him or her that way? Is the employee confused with what information will be covered, possibly because an appropriate outline was not given? Does the employee just have a dominant "A-Type" personality? Once these questions have been answered, a trainer can then move to the next step of addressing the situation to fit the learning style of the trainee. I've listed four rather common types of impatient trainees below.

Calming "Nervous Ned"

It is our job as professionals to think about what is causing Ned to feel this way. Is Ned completely new to his profession? Is Ned the oldest or youngest in the group? Sometimes it can be hard to figure out exactly what is happening to make this individual nervous. The way to get around this is through some sort of opening activity or icebreaker. A fun, exciting, single or group activity that has absolutely nothing to do with the job at hand could have everything to do with getting Ned to break through his shell and become calm. It is also important to have a clear agenda to reaffirm that all topics of concern will be covered. A tip to those who are able to do so: call the trainees or send them an email introducing yourself before the session begins. This helps to break the ice and also helps them to be slightly less nervous before walking into your class.

Understanding "Clicking Carla"

Carla could just be a very impatient person who does not like to wait for computer pages to process or load. The way to handle this is to know your technical equipment. If it is the equipment your facility uses all the time, there should be a basic understanding of what takes long and what doesn't. If the equipment is not yours and you are traveling to another facility to train their employees, arrive a day early, if possible, and do a walk-through with their systems. This actually benefits everyone involved in case there is something faulty that the trainer needs to be aware of. When there are programs that take a long time to load or are slow because they are processing large amounts of information, it is important to engage the trainees in conversation to take away from the silence and the wait. Also, please explain to that employee that more clicking results in a longer wait time. This will tend to make people stop clicking their mouse frantically.

Handling "Inquisitive Irene"

Irene is an individual who wants to know the why's and how's to everything and is willing to speak over the group and the instructor for clarification and better understanding. For individuals of this nature, it is important to cover the agenda very clearly and also explain the subtopics of the main topics. Also, it is very important to address the group as a whole in the very beginning of the training session and let them know that questions are appreciated, but they will be taken during the wrap-up of each section. It is important to always state, "There may be questions that arise but please wait until that session is complete to ask them as they may be answered throughout the presentation." This should help with the overwhelming amount of questions being asked during the session. A tip for long training sessions lasting over multiple days: Put up a "Question Board" and have attendees use post-it's to write questions to stick on the board at breaks. Address those questions at the end of the day, and more often than not, those questions will have already been answered.

Addressing "Dominant Daniel"

Daniel has an "A-Type" personality, meaning that he is very comfortable thinking that he knows more than the others in the room and possibly the trainer. Daniel wants to win at everything and be known as a leader to all. Because of this personality type, these people will over run group activities and try to take over training on any area they are comfortable with even though they are not the Subject Matter Expert. When there is a "Dominant Daniel" in the room, he will most likely take over and scare off any shy people from ever talking if he is not addressed in the beginning. Once this personality is noticed and they are becoming impatient with the training (because they are only interested with what benefits them) it's time to show them it is your training class and you are the boss. Ask them to please refrain from making comments because everyone learns differently. Ask them to work with a fellow student on subjects where they excel. Supervise group activities and re-iterate the importance of everyone working together as a group. If Daniel is completely out of line, then it is okay to pull him aside during a break to explain the importance of him participating as part of the group. If that still does not work, then it is time to contact Daniel's supervisor.

In conclusion, I leave you with a quote from William Shakespeare, "Upon the heat and flame of thy distemper sprinkle cool patience." We can all be impatient in our own ways, but what's important as a professional is that we sit back and understand our trainees before ever getting frustrated or impatient with them. We lead by example, and if we are calm, we can calm our trainees.

Amy Bean grew up in Moorefield, WV where she still resides today. Graduating from Moorefield High School in 2003, she went on to obtain a degree in Criminal Justice from Marshall University in 2007. She is currently completing her MBA through West Virginia University and also working for Summit Financial Group as an HR Training Coordinator. Amy wishes to pursue her PhD next year and aspires to always work in the learning field, teaching and helping others.

Self-Awareness: How to be an Effective Facilitator

Amanda Braun, Nationwide Insurance

I am a corporate training specialist and throughout the years I have been given advice on what my facilitation style should be. However, I have discovered that a "one-size fits all" approach does not apply when determining what makes an effective facilitator of learning. I don't believe there is one style that all facilitators should follow. Being self-aware and bringing your own personality into your facilitation makes you successful. The ancient Greek aphorism, *Know Thyself*, encourages self-realization, or self-awareness. I believe self-awareness is an important competency needed for a person to be an effective facilitator. Being self-aware means knowing your areas of strength and weakness. It also means knowing when to admit you don't have all the answers. And it means you understand and utilize your unique style. To be a facilitator who engages and stimulates participants, you need to be yourself.

Knowing your strengths and weaknesses can help you expand your skills as a facilitator. By acknowledging your weaknesses you are better able to control them. For example, I often find myself using terms that participants don't understand or talking above their knowledge level. This can cause the participants to be disengaged. Since I am aware of this tendency, I adjust how I approach my sessions by defining terms and adjusting the complexity of the information I present. On the other hand, knowing your strengths can greatly increase the effectiveness of your facilitation. One of my strengths is individualization, where I am aware of and appreciate people's personalities, motivations, likes and dislikes. I use this strength to tailor and personalize my sessions throughout the day in order to relate to an individual and/or to the group. As a facilitator, you need to think about how to highlight your strengths and minimize your weaknesses.

Facilitators often believe they need to appear as if they are knowledgeable in all areas or else participants will question their abilities, which could negatively impact the effectiveness of the session. In reality, if you're honest with yourself and with others about your knowledge of a topic, you will gain credibility and respect from the participants. Instead of avoiding a certain topic, I admit to the areas where I am not knowledgeable. The more you try to hide your weakness in a certain area, the more exposed it will become. It's perfectly acceptable to admit that you don't know the answer; tell your participants that you will need to research the topic and answer their question at a later time. I have found that a more effective solution is to draw from the wisdom and knowledge of the participants in the class. If I am not familiar in a certain area, I will throw the question out to the group and someone may be able to provide the answer. I completely accept and acknowledge that there may be an expert in a certain area in the room. The session will benefit greatly from that expertise.

As a facilitator, you need to develop your unique style. Understanding your style and your personality can help you develop into an effective facilitator. One of the biggest mistakes that can be made is to copy the style of someone else. This would be like wearing someone else's clothes: the clothes may fit, but they just don't seem to suit you. Don't try to be someone you are not. Be yourself. By doing so, you will be more comfortable, you'll have more fun, and your sessions will be more engaging.

The competency of self-awareness must not be forgotten when becoming an effective facilitator. The Greeks were correct in saying that we need to gain knowledge about ourselves. This self-knowledge will help you utilize your strengths and diminish your weaknesses. Admitting that you don't know all the answers, you allow the participants to respect you and feel as if they are not being lectured to but being conversed with. You want your facilitation style to reflect who you are, not someone else. The Dalai Lama says it quite well, "To have greater self-awareness or understanding means to have a better grasp of reality."

Amanda Braun received her degree from Waldorf College in 2004 and obtained her Project Management Professional designation (PMP) in 2008. She is a corporate training specialist for Nationwide Insurance, having joined the company directly out of college. Amanda specializes in computer simulations where participants learn about the insurance industry by managing their own insurance company. She is also involved in corporate efforts to increase the use of virtual technology to better reach Nationwide's dispensed workforce.

You Are So 20th Century…Technology in the Workplace

Clark Payne, National Weather Service

Imagine this…

You are sitting at your desk. You have an approaching deadline and you have an hour to get it out the door. Your phone rings, it is a co-worker on the project. You answer the call, but the co-worker is just finding out what you want to do for lunch, so you quickly discuss where to go. After hanging up, you get back to the project for 10 minutes when you see the pop-up for your email, so you check that quickly, but it was nothing important so you open back up the project. However, someone stops by your office and says you are needed on chat. So, you take a look at the message and take care of the issue. While you are taking care of the chat message, you get a text message from a family member. You take that message real quickly after you finish the chat message. All of the sudden you look down and realize you have 15 minutes to get the project finished, whereas you felt like you just had an hour. You end up rushing the project to get it out the door, but with some mistakes because you did not have time to proofread.

Now imagine this same person 30 years ago... He or she would not have had chat, email, text messaging, etc. as distractions in the workplace. So, a co-worker might have called, but the other distractions would have waited. Therefore, this person would have practically the entire hour to finish the project uninterrupted. This means that the project would have been finished, and with no mistakes.

In both cases, the project met its deadline; however one was done without mistakes making it a better, well-rounded project. Additionally, the project did not need to be revised later on when the mistakes were found.

Technology was to blame in this situation. But wait! If technology is so bad, why does it flourish?

Imagine the same scenario as above, but this time you are about finished with the project when you find out you need some help. Thirty years ago, you would have dialed up the person you needed on the phone. But guess what? That person has left early for lunch and will not be back in the office for an hour. Not good…you needed him now! Well, to get the project out the door, you just do the best you can and hope the mistake is not too bad.

Now take the current, new-age person who calls the person that is needed, finds out she is at lunch, so tries her cell phone, but no answer. Same conclusion, right? No! That person is working on her tablet at lunch and gets an email from you and is able to utilize remote desktop to send you the material you need. So, you get the project out on time with no flaws.

As you can see with the examples above, technology can be a positive or negative influence in the workplace. In some instances, it can distract you and cause you to miss deadlines, or rush them. In other instances, it can save you from missing deadlines or turning in a project not completely polished. Do we then look down on or highly upon technology? The answer is: it depends! As with any tool we use, if used properly, it can make our lives easier and more efficient, but used improperly it can slow us down and make us less efficient.

Some helpful hints I have received with utilizing technology in the workplace include: turn off email pop-ups, check email at pre-designated times (and this can be applied to other communications means), and set aside time where you are completely disconnected. I am sure there are many more thoughts and helpful hints. What are yours?

So, the next time you find yourself fumbling with technology at work, ask yourself if you are utilizing technology the way it was intended. Imagine the scenarios above. Which one are you in?

Clark Payne is a research associate at the Warning Decision Training Branch (WDTB) for the National Weather Service (NWS). He has been working there for 4 years. Clark's expertise is in dual-polarization radar and severe storms meteorology. The primary task at WDTB is to develop training to help NWS forecasters utilize weather radar to issue warnings during severe weather

Noooooo! Not Training! Please Don't Make Me!

Sarah Cooper, Waste Management

Have you ever thought that training was pointless? That you were being forced into the worst possible class ever? If so, then you are not alone. Resistors to learning are on the rise, and most of this stems from the lack of communication around the relevance of the training topic.

Why do people resist learning? This million-dollar question truly has a simple answer.

1. Training was not effectively communicated
   a. This gives the perception of 'forced' training
2. The training is not relevant to the person
3. Training while important is not engaging

These resistors are true showstoppers to learning. When training is blocked by these resistors, no matter how relevant or necessary it may be, it will not be effective or be perceived in good light. Resistors come out in full force when the audience does not understand how the training will benefit or impact them. The basic step of establishing the WIIFM (What's in it for me?) is missing.

Communication. When people are blindsided by training, it negatively impacts the context of the training and it puts the learner in defense mode. Consider this, do you become frustrated, anxious, angry, etc. when something comes at you from out of nowhere? This question needs to be taken into consideration when training is being released. Training is supposed to be a supplement to the learners; it is not the basis of how they do their job, and it can only enhance or generate new ideas for improvement. Lack of communication around the WIIFM tarnishes the effectiveness of the training and generates a resistance to learning.

Relevancy. It is also part of the WIFFM strategy. If there is no context provided to the learner as to how training directly relates to his or her job, then there is disconnect. There were many times as I sat in a college lecture and thought to myself "do I really need to be here, is this class really going to help me when I enter the 'real world'?" Granted, in order to graduate I had to take the class so therein lied its importance; but when it comes to training on the job, it is not always that cut and dry. Making sure the learner knows that taking the class will give them -- new knowledge, skills, strategies, ideas, processes etc. to apply at work -- will provide better perception about the training.

Engagement. No one wants to be taught in person, virtually or through web-based training by someone or something that is boring beyond belief. Creating a fun-filled learning environment is a great strategy. Engage the audience by question asking, breakout sessions, games, simulations, skits…I could keep going. The main point is to get the learner excited about learning. No matter what kind of subject you may teach, there is always a way to engage your audience.

Finally, if the purpose of training is communicated properly, the learner will be able to identify the WIIFM. Consequently, the resisting barriers will diminish. Communication is the key to avoiding resistance to training. Effective communication draws attention to the relevancy and importance of training. Don't create resistance. Communicate!

Sarah Cooper received a B.A. in Exercise and Sports Science with an Education concentration from St. Mary's University. Academic All-American two years and Academic All-District her senior year, she played four years of college softball. Sarah's career plans include pursuing an M.S. in Educational Human Resource Development, with the intent of becoming a Learning Consultant and ultimately a Director of Learning. Learning is her passion; she loves learning new ways to engage an audience.

Packing for Your Career Destination

Alisha Natvig, Benchmark Learning

It's funny how vacations can bring out the planner in anyone.

First, you dutifully explore every possible exotic destination, weighing out geographic amenities, weather, activities, and of course, pricing. Then, you proceed to search for flights and lodging, paying close attention to comfort and convenience. Next, you plan your itinerary of events, skillfully squeezing in as many pleasurable activities as your time and budget allow.

Before it's all over, you've booked a rental car; made breakfast, lunch and dinner reservations; printed out receipts, confirmations and directions for everything under the sun; and packed your suitcase with 50 pounds — not a pound more or a pound less — of carefully considered necessities.

Phewf, what a load of effort! And for what? A trip; a week-long getaway from reality.

But what happens when you return to reality? Are your plans as nicely laid here or are you aimlessly going through the motions? Why is it that planning seven days of your life happens eagerly and automatically, but planning for your career is an afterthought?

Just as you plan your vacation, you should plan your career, as well as the learning that is required to get there. A plan is a powerful thing. It forces you to consider all of your options and pushes you to make intentional steps toward your goals. Do you really want to approach retirement by accident? With no rhyme or reason as to how you wound up there and with regrets of who you could have been?

There's a better way! As a learning leader, be a role model for career-centric learning and help others follow suit. Start planning your career and take ownership of where you're going with it.

Once you've identified your next career destination, the real fun begins! It's time to pack in the learning. Document how you're going to advance to your next role, whether it's through instructor-led training, a conference, a mentorship or a blog.

Set timeframes for following through with your learning commitments and share them with someone. A partner in learning -- whether your boss, a friend or someone you just met -- can motivate you to stick to your plan and provide advice and insight.

Make your learning purposeful and you will not be disappointed. Are you packed for your career destination? It'll be the trip of your life!

Alisha Natvig is a User Experience Designer at Benchmark Learning, headquartered in Minneapolis. In 2011, she helped create the vision, blueprints and interface design of CareerGenius.com, a free service for building personal career and learning roadmaps. She led a series of student focus groups and Knowledge Advisory Board sessions, consisting of learning and career development leaders, to guide the product's conception. Alisha earned her bachelor's degree from Iowa State University and is currently pursuing her master's from Globe University.

Closing the Loop: The Relationship between Training & Support in Higher Education

Joshua Gaul, SUNY Empire State College

Our college gives us the freedom to use a host of different software: from backend systems like Datatel and Lotus Notes to front-end tools like ANGEL, Wordpress, and Drupal, there are too many questions for one (or ten) helpdesk person(s) to answer! But above all, we just have to remember one thing: people don't call the helpdesk to learn anything. People call the helpdesk to get things fixed.

Now, one of the main purposes of training is to avoid those problems from happening, right? But, with such a spread-out institution like ours (35 locations across New York and abroad, as well as online), there's no way logistically and financially to give every student, staff member, and instructor the training they need to competently perform all the tasks asked of them. So, we have a substantial breakdown: too much time taken by helpdesk personnel to fix problems that can be avoided with training systems whose delivery isn't feasible.

My proposition to fix this problem is simple (in theory, not practice): a systems thinking approach that forms a loop between the helpdesk and any office of the organization that develops training. Since we don't have a true "training department," this falls on all the experts within the organization who are asked to put together support documentation, training tools, and handouts that walk users through their systems.

In an attempt to lay out a simplistic approach, I'll break it down.

STEP 1 - Active approach to just-in-time training
Obviously, we can't expect to schedule personal training sessions with all of our learners. The only reasonable solution is to identify the needs of the end users and give them answers before they ask the questions (that sounds easy). If we see a high level of questions about a topic, we create a short, simple video tutorial (closed captioned with a print version too), make it easily accessible/reusable, and alert all the offices of its availability and location. They can then repurpose such a video, build their own context around it, and "spread the word." It becomes a puzzle piece in a larger program, or a stand-alone support tool.

STEP 2 - Helpdesk as a marketing and tracking tool
An end user calls the helpdesk with a question, and the helpdesk notes the user, the course, and the date. The problem is **fixed** (by whomever – helpdesk person, second tier expert – and this step is occasionally forgotten), and the user is pointed to the already existing tutorial on the topic. The end user's superior (office director, instructor, etc.) is notified of the problem and who reported it, so he/she can be aware of possible shortcomings in support developed and offered outside of our office walls.

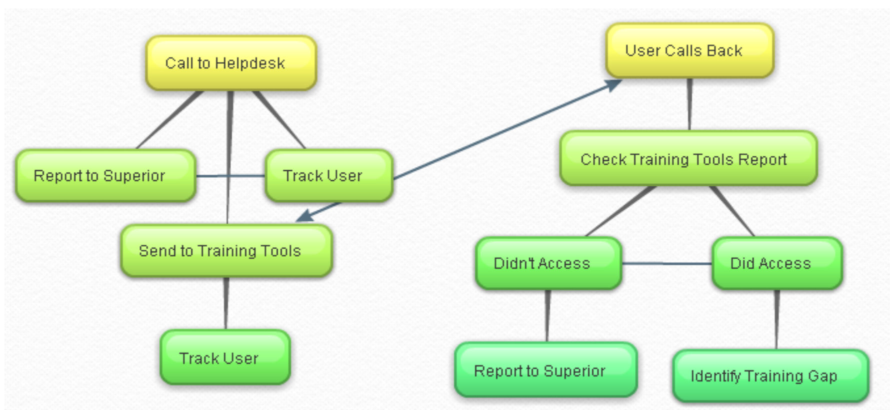
STEP 3 - Track the tutorial
If an end user watches the tutorial, we know about it. So, if that same end user calls the helpdesk again with the same problem and there is record that he/she viewed it, we can identify a gap in training. Obviously, we're missing something that prevented this user from learning this topic. If our records show the user has made no effort to learn the topic through our provided material, we can notify the end user's superior. From there, it becomes evident that either the end user isn't putting in the effort necessary to learn what is needed or there is another breakdown in the delivery system which needs to be understood.

Let's take a look at a real-world example: *an online, adjunct instructor calls the helpdesk because the gradebook isn't functioning properly in the Learning Management System*.

For this process to work, we need to take into account a few assumptions:

- *Tools are working*. If there's no record that shows the gradebook in this ANGEL course was functioning, how do we know when/how it broke? There needs to be an effort made to ensure each gradebook's functionality before the course is offered, so if an instructor reports a break, we can nail down the root of the problem.
- *An investment in self-directed learning*. As beneficial as the helpdesk is, it can breed a sense of learned helplessness that circumvents **true** learning altogether. We, as a learning-focused institute, need to push students, staff, and faculty to start taking responsibility for their own learning and start helping one another.
- *Agreement to develop proactive training*. If we start building accessible training tools that can be utilized 24/7, we can touch more learners simultaneously. It's cost effective, time efficient, and causes a lot less headache. But, without a home-based training department, we have to trust that all departments will make the same investment.

In visual form:



Maybe I'm expecting too much of people (if that were the case, I wouldn't have gotten into this business, right?). It's tough for me to believe that people working in an education-based organization wouldn't have a thirst for learning that doesn't revolve around scheduling three-hour sessions with an in-person trainer every Tuesday morning.

Don't get me wrong; I'm not saying that we learning professionals never make mistakes in the way we provide support documentation and user-driven training. It's to say that, if a loop exists that can point to people, processes, and systems that can be held accountable, then we can begin to define the areas where we need to attack problems before they happen. Otherwise, we get into a never-ending cycle of problem-fix-problem-fix without identifying the underlying issue. We shouldn't be an organization based on damage control. We're fueling apologies instead of creating self-sufficient learners.

The best possible result for a model like this – our "Shangri-La," as it were – is a situation where the helpdesk is irrelevant (in a skill–related way; there will always be a need for system fixes and a reporting system). End users are **so** proactive with their learning that they fix their own problems and learn from their mistakes and accomplishments, thanks to tutorials and documentation we provide up front. Until that point, the best we'll get is more like *Xanadu*: a lot of dancing, singing, and roller skating around our problems, with no semblance of a solution (or plot). And I'll be damned if I'm going to model my organization after any Gene Kelly performance that isn't from *Singin' in the Rain*.

At Empire State College, Joshua Gaul's focus involves building systems to support learning environments where students and faculty collaborate on-line. His major goal is to usher in an organizational change to create an internal network of faculty and staff training that centers around and rewards self-directed learning. Joshua's instructional design and course development experience as graduate assistant to Dr. Richard Lamberski at Indiana University of PA really ignited his move into the world of learning theory.

Activate Attention. Think of the Brain.

Dimity MacDiarmid, Accenture

CALLING ALL ATTENTION SEEKERS! Yep, that's you. Or it needs to be. Ok, so maybe not YOU individually, but rather, the learning programs you create and offer. These need to be the attention seekers! And, digging deeper, we all know it's not the attention *seeking,* but rather the attention *getting* that's important.

Every single human brain pays zero attention to boring things. FACT. Neuroscience proves it. Our brain literally, physiologically, does not respond to boring things. No neurons fire off, no connections are made, and no change takes place at all in the brain when exposed to boring things. If no change takes place then no learning has occurred.

If you want powerful and effective learning you need to get the brain's attention. More accurately *focused*, *high-quality* attention. Learning professionals have a responsibility to know about the brain, because ultimately the human brain is our customer!

Therefore, if your content and delivery is dull, your online course is uninteresting; these factors are the sure-fire blockers to any meaningful learning.

That said, how do we get the brain's *focused* attention? How do we sell our product to our customers?

Unlike a computer, the brain constantly changes, depending on what it learns. Think of the 'use it or lose it' concept. Unless we are appealing to the brain, asking for its attention, little learning will occur. Brain ability can diminish if we don't continue to use it, similar to the muscles in our body.

Neuroscience can help. Neuroscience is the study of the nervous system and the brain providing insights on human thought, behaviour and emotion. Its findings are continually evolving. It is opening the brain up to us in ways like never before.

Neuroscience is providing the proof on what promotes or constrains the brain to change: what catches the brain's attention and alters the brain; what gets no response, or change, whatsoever.

Neuroscience gives us the hard facts around learning, reinforcing what is sometimes perceived as "soft and fluffy". For learning professionals, this is an exciting evolution as we can cater to the human brain and get the results we constantly seek.

To get their *focused* attention, remember, brains love;

- Visual enticement > get attention by using colour, diagrams and pictures. Make them memorable and clearly link them to the information.
- Life significance > how is it meaningful to them? How can you relate it to categories or information they already know? How will it impact them?
- Emotional triggers > use humour, stories, anticipation, quizzes, games. Have some fun!
- Short sharp intervals with breaks to refresh > ask learners to stand up, get a glass of water or do something that allows the brain to refresh. And do this regularly. Make your learning segments short and snappy for greater impact.
- No distractions! Encourage your learners to disconnect from the internet, close email, silence devices; remove any distraction unrelated to the learning experience. This will ensure the brain does not attempt to

multi-task, which requires attention to be split. Instead, allow time to focus on other unrelated items, at provided intervals.

Now equipped with such insights, let's get the brains attention and make *real* learning happen. Marketing professionals use these techniques every day. Notice them around you. For example, what specifically makes an advert really stand out to you? How about an experience you recently had? What makes you never forget it? Or, why is a friend's story stuck to your brain? What causes you to remember it so clearly?

I now challenge you. The next "thing" you do. *Anything.* Practice appealing to the brain. It could be when you tell a story, write an article, give a presentation or design a learning program. Think of the brain. Think, what can I do to get the brain's attention? And see what results you get. You just may make the "impact", literally, physiologically, that you have been looking for.

Dimity MacDiarmid is a senior Learning consultant at Accenture, Australia. Over the last 6 years, she has worked across many industries; Travel and Tourism, Higher Education, Telecommunications and International Development. In this time, she has developed the knowledge and skills necessary to design organizational development frameworks, lead learning programs, facilitate teacher training and produce videos. Her passion lies in self-directed learning, facilitation, communication, contribution and recently Neuroscience. Work is balanced with yoga, music, friends and fun!

Learning Management Systems: Give 'em a Break

Kelly Rico, Pioneer Hi-Bred International

It has never been my goal to be pessimistic (actually I am generally seen by others as quite cheerful and optimistic), but when it comes to the growing expectations individuals have regarding a Learning Management System (LMS), my optimism begins to diminish. As learning professionals, we need to take a step back, look at how far LMSs have come throughout the years, and then pull in our own reigns and realize all that progress did not happen overnight. Learning departments everywhere are creating such high expectations of what an LMS should do, and they are failing to understand technology is not a one-way street; as a result, other factors may be compromised in the process.

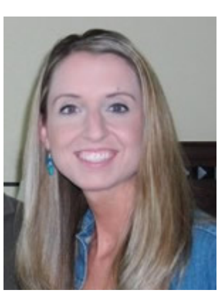
The Learning Management System was originally designed to manage the significant work effort of training employees, contractors, customers, and numerous other audiences. This focused initially on classroom and e-learning training administration; however, through the rise of technology the LMS has come to include many new, enhanced features including mobile learning, social networking, and self-tracked training (just to name a few). Moving learning to bigger and better places is a desire of all learning professionals, so these new technologies are a great benefit to the learning world. But with great enhancements come even greater expectations, and learning professionals have to be able to differentiate between the realistic/practical versus the out of reach/improbable requests. Understanding that there is a give-take relationship with technology is critical in the learning profession when dealing with an LMS.

Let's take a look at a few examples:

An LMS should have the ability to accurately track attendance for training events with no follow-up administration efforts needed. Let's be realistic: A technology system is not going to be able to automatically know which participants attended a classroom training session and should be granted credit in an accurate fashion. Here is where the give-take comes into play. Either an administrator is going to have to step in and do a little follow-up work to make final attendance correct (leading to more accurate records but less focused on a self-service model), the participant is going to have to acknowledge they attended a session (leading to a more self-service model but potentially less accurate records), or the system will assume those who registered actually attended the session (leading to a fully computerized model but the most inaccurate of records).

An LMS should be able to successfully launch content to anybody's computer system with no issues or support calls. Allowing participants to have a problem-free experience during training is critical, but let's again be realistic. Learning departments want the LMS accessible inside and outside firewalls, to all audience types (both internal and external), through mobile devices, and available 24/7. Technology that is used in such diverse environments is going to have its moments, which are where the give-take opportunities come into play. The more widespread your environment offerings, the greater likelihood of potential issues appearing (due to such factors as the control over standard operation systems diminishes) but accessibility to learning is increased; whereas more tightly confined parameters placed on an LMS are going to provide a more problem-free experience for participants (due to factors such as enhanced control over standards and devices) but accessibility to learning opportunities will decrease.

The LMS has made significant strides throughout its life, most predominantly contributed by the technology growth that continues at a rapid pace. I don't believe this technology growth will slow down (which I am glad) but there needs to be more awareness and communication regarding where the future technologies of the LMS will take us and what effects those may have. Many people are already aware that in order to be an enabler to learning professionals, the LMS needs to adequately adapt to the changing needs of learning departments and increased technology. What we also must always keep in mind is that, in order to be an enabler of the LMS, learning professionals need to be fully aware of the capabilities (and short falls) technology offers and understand the give-take relationship that comes with it.



Kelly Rico is a Talent Development Consultant at Pioneer Hi-Bred in Johnston, IA. In her current role, she manages learning technologies, including the LMS, assessment systems, and learning resource systems for the company's global population. Kelly received her master's degree in Industrial/Organizational Psychology which ignited her passion for the learning field. She enjoys working with individuals on their learning needs and also researching up-and-coming learning technologies/advancements.

The Value of People When Learning

Kerry Blomberg, Learning & Leadership Development Consultant

I once had an economics professor who taught me the value of conducting research. Ten years ago, research consisted of going to the library, making copies of journal articles, following stories in the newspaper, reading books, and even interviewing other subject matter experts on the topic. Only then was I able to place my own opinion on the topic. I can remember going to the basement of the library, waiting in line for the librarian to bring me back the journal I needed, then carrying the six pound journal to the photocopier… which always seemed to break down. Research like this took a couple of weeks. It's amazing how much has changed in ten years.

Now, research is so much easier; I can find all the research I need by a quick search and a small license fee. What once took a couple of weeks can now be accomplished in a couple of days. Technology has allowed us to get our work done without any interaction with people. But just because something is easier, does it make it better? I would argue from my experience that the value of all that we learn comes from the interaction with other people.

Going back to my story, I left out that by being in the library, I met a few people going through the same experiences I was as a student, and we became lifelong friends. The librarian actually told me about her family and would give me a couple of her homemade cookies to get through the long hours of studying. The interaction with people and working as a team with other students was the best part of my college years. Even in my current job, the work is more rewarding when you brainstorm and work as a team.

My greatest inspiration for this paper has been the stories of other program participants. I asked the question: What has been your greatest learning experience? And the stories demonstrate that our greatest learning experiences have been from a combination of a training course with a knowledgeable facilitator, the assistance from a more experienced colleague, and/or from receiving feedback after making a few mistakes. The theme seems to be that although technology enables us to be more efficient, the greatest value in learning comes from the interaction with people.

Here are a few other stories of great learning experiences from fellow 30 Under 30 members. What themes do you notice?

Sarah Cooper • *My greatest learning experience came when I initially started my job. I was asked to take the Insights Profile Assessment, which would produce personality results. When the results came back, they were segmented into different color energies, but I did not understand why this was useful. Then I was sent to the class to learn what each color meant and how to relate to other color energies. The instructor was fantastic! She broke down each color, gave personal examples and fully engaged the group. We did breakout sessions, group tasks, role play and many other fun simulations to really reiterate the personality types and how to relate to each one. This was the most effective training I have been a part of because the instructor did not talk at us the entire time. Instead, she kept us moving and put us into situations to demonstrate how to use the information we had received. By the end of that training I was not only more knowledgeable on the topic, but I was also able to explain what I knew to others who had questions. Best session I have attended so far!*

Clark Payne • *My greatest learning experiences have come when I've been tasked with a project at work and need training to complete it, instead of just going to a training seminar with no specific need in mind. I don't get nearly as much out of the training as I do when I have a particular project in mind for work. For example, I needed to create a user-interaction using Adobe Flash but had no formal training in Flash. I took a two-day course at a local institution and was able to immediately apply what I learned to the project I was working on. And I believe that is what made the training so valuable...I was able to immediately apply what I learned back to my job so it stuck with me more.*

Zack Rhoades • *I'd say my most effective learning experiences have been when I've been forced way out of my comfort zone. Either on a project that I've got less experience with, which goes with Clark's idea of needing additional training, or something out of my skill set like having to give a technical presentation to a non-technical group. I find it is those situations that have helped me grow more than anything else.*

Joshua Gaul • *I would say my first job here at Empire State College. I was brought in on a contract position as part of a team to move all our online courses from one system to another and develop and deliver the training to all faculty and staff. It was less about learning the system and more about learning how to meet the needs of all our users spread across New York State and beyond. About 70% of our online instructors are adjunct, so finding a way to support them is a logistical nightmare. Though I still work for Empire State College and my job has extended into other areas, I still focus most of my responsibilities around the end users and how they use the tools we hand them. So, in a way, my greatest learning experience is still going on - continuously finding ways to touch as many users as possible in the most cost-effective, beneficial manner possible.*

Daniel Zumbrunnen, SPHR • *My first job in HR right out of college was working as an HR Investigator here at Publix, so I was always out in the field investigating complaints about harassment, discrimination, and the like. I was so impressed at the amount of training for the job - we had two weeks in a classroom and a couple months working with experienced investigators - but I was shocked at how much I learned when the safety net of that other person was gone and I had to interview people all on my own. It only took having one or two investigative reports that got poked full of holes to help me see clearly what I needed to find out during an investigation. Now do you think that was covered in class? Of course and probably for days, but seeing it first hand with my own example was so much more helpful.*

Kerry Blomberg is a Learning & Leadership Development Consultant, based in New York, with an educational background in Industrial-Organizational psychology from Hofstra University. Kerry has worked as an internal and external consultant in various industries, including financial services, media, and pharmaceutical sales. Kerry's passion for learning comes from her humble roots growing up in Queens, New York where she learned at a young age that excelling in school and having a college education will open many doors of opportunity. Kerry has plans to obtain a professional certificate in Executive Coaching from NYU in 2012 and to continue her work in learning and leadership development.

What is an Expert?

Jessica L. Kamerer, Lancaster General College of Nursing and Health Sciences

The first time I was told that I was an expert I replied, "Really, why is that?" What I was told is that you are an expert when you're asked to present about something. I was very interested yet perplexed at this comment. I guess, as a consumer and learner, I was guilty of passively accepting experts as the beholder of all the knowledge, the be-all, end-all of the classroom content, and my purveyor of the knowledge.

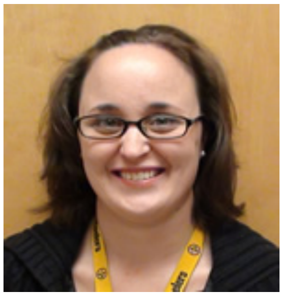
I was thrown for a loop when the tables were turned and I was to be the "expert." I was left wondering, scratching my head in contemplation. While I was confident in my knowledge and ability to help mentor and teach others, I had to step back and think why am I the expert? What has changed me from instructor to expert all of the sudden? I guess I had always considered that the experts were the ones who knew everything and were in charge of sharing with novices and learners. But now as the appointed expert, I also still felt like a learner. It presented a conflict: could I really be an expert without knowing everything? This revelation was upsetting my conditioned belief in the traditional, authoritative, educational paradigm of learning. Could the expert teacher really still have something to learn from students?

Working through all of that craziness, I was also left thinking, who really validates experts? I was never an expert until someone asked me to present on a topic. That didn't really seem like a solid foundation for validation, to me at least. It only really assured that I probably knew more than the person asking about the particular subject, not necessarily that I knew more than the learners. I knew I most definitely didn't know everything about anything related to the content. So what really does makes an expert an expert?

We could look at portfolios for publications, experience, degrees, job descriptions, etc. But then I thought, some of the best people I've thought of as experts have never published or don't hold doctoral degrees. That idea was shot down. What do those with all the "tribal knowledge" or "street smarts" from years of work or experience get classified as? We all know them, they are the people that retire after 30 some years and everyone says, "Wow what are we doing to do without Bev? She always had the answers locked in her head." Clearly everyone wishes they could magically pour out the hidden contents of Bev's brain to keep things flowing well in the work place, but was she ever an expert or just someone who knew a lot of stuff?

Sometimes I still ponder these questions. Here is the best conclusion I have to date on the subject (and please keep in mind it will most likely evolve as both my life and career go on). First, it is entirely possible to still learn and lead learning while being an expert. Forget about conformity to the traditional paradigm of learning. Looking back on my experiences as a learner, I never doubted a teacher if he or she admitted needing to look something up to answer a question or only knew of resources to point me to; I admired this ability to adapt to the situation and not give me some frivolous or bogus answer just to save face in front of my peers. Remembering that, I also thought of when I have had to do this as the educator, and it helps me to learn something new on the topic, expanding my knowledge base as well. Some of my favorite moments as an educator come when students bust out some profound enlightening comment that makes me just think, "whoa, that is a great way of thinking about/applying/using that information."

Second, I have to come to discover personally you can be an expert one day and a novice the next. Expert to me has come to be a relative term to one's environment, company, and/or situation. I am sure it is different for many of us, and I have come to be okay with this fluctuation in status in my own career. I love that I can help some learners as an "expert" one day and still learn from them while doing so, but then I can be a novice the next day in a new or varying circumstance. I still am not really sure of how to validate an expert but I have come to my idea of what invalidates one: someone who has decided he or she knows everything and has nothing left to learn. Meaning that, as experts, life, research, circumstance, technology, etc is always evolving and to maintain being an expert we should keep rolling with these changes. We need to keep with the times by learning from these changes; the learning may come from our learners or our own circumstance. Either way, I cannot really see a difference as long as we evolve with the change. So in conclusion, as best I can tell, the best way to become and maintain being an expert is to never stop wanting to learn.



Jessica Kamerer, MSN, RNC-NIC is a Simulation Learning Facilitator for Lancaster General College of Nursing and Health Sciences. As the facilitator, she works with educators at the college and affiliated health system to develop simulation and innovative educational programs. Her passion is to create inventive, learner-centered curriculum that can teach complex medical concepts and be resourced by all levels of educators and learners to improve learning outcomes.

Are Electronic Learning Tools Making Us Forget the Learner?

Daniel Zumbrunnen, Publix Super Markets, Inc.

Are we putting too much faith in the electronic resources that are available to us in the learning field? We've got computer-based training (CBT) coming out of our ears, the ability to share our screens across the world with webinars; we can blog, we can podcast, we can tweet, we're linked into social networks – well, you get the point. I'm a pretty wired guy and am naturally drawn to the shiny object that is the newest technology, but as learning professionals, are we getting too reliant on technology to train?

Rapid eLearning development tools on the market make it so easy to create solid CBT in a short amount of time that we can quickly fall into the rut of defaulting to a tutorial for a training need, especially with system training. And it's not just instructional designers that can fall into this trap – it's subject matter experts too. It's critical that the learning part of your organization never loses focus on what matters most, and I'm hopeful you'd agree that helping our students learn is goal number one.

Before you jump into designing your next CBT, ask yourself how much value an instructor could add, especially if they're experienced in your training topic. Let's consider a system implementation – it could be a new point of sale system, a new ordering system, or a new self-service kiosk – could an expert help facilitate student learning better than a CBT? You need to ask yourself if your new system is going to pretty much stay on what I like to call the "happy path" or if it's something that is going to throw your users curveballs or force them to regularly be making decisions on the fly. If the happy path is where your system is headed, then it sounds to me like CBT may be the perfect delivery medium for you. However, if your system has a medium to high likelihood of needing real input from students to drive your final output, will CBT be able to get them where they need to go? Maybe not. And are there scenarios that will come up in the actual system that you can't simulate in whatever sandbox-environment you have available to create your CBT? What seemed like a natural fit for CBT – system training – may not be the best choice.

Organizations can steer towards this CBT rut because the investment in developing trainers who can replace that CBT isn't cheap. While we're in the learning field, we've got to keep business focused and being able to determine the impact of not training the right way the first time is vital. As a learning leader in your organization, you need to speak up if slipping into the CBT rut is going to compromise your company's investment in a system that users may not adopt or use properly. In most cases the investment in developing trainers is cheaper than having a system that's collecting dust. What will you do the next time you face this situation? There's no cut or dry answer, but if you currently feel like you're in the rut of defaulting to CBT whenever you're confronted with a system-based training need, I hope you'll stop and ponder some of these thoughts.

Daniel Zumbrunnen manages training development for Publix, the largest employee-owned supermarket chain in the US. He holds a Bachelor's degree in Management from the University of Georgia, a Master's degree in Human Resource Management from Florida International University, and is SPHR certified. While he's worked in several HR roles, he's happy to call training home and is excited to see it continue to evolve every day, giving us more options (and difficult choices) as learning leaders.

Collaboration: The Gateway Drug to Learning Paralysis

Leecey Cameron, The George Washington University

Collaboration is a drug, and we are all addicted to it. I believe in teamwork and support embracing a variety of perspectives but I'm not sure we're getting the return on investment (ROI) that we can from the hyper collaborative world in which we live. Although collaboration can be an efficient way to gather and synthesize multiple perspectives in order to reach business results, our collaborative environment has trivialized learning and has moved us into a state of learning paralysis. We can easily get lost in our drive to achieve the end result and forget to leverage the collaborative experience as a developmental tool. Collaboration should be used intentionally, as a way to develop human capital in organizations. To do that, however, we need to reinvigorate its *learning* element - I suggest the following.

First, add value. My most memorable encounters with collaboration occurred in middle school. I would frequently work with my best friend, Claire, to choreograph long and complicated dance performances. We weren't afraid to challenge one another and we consistently leveraged our varied dance backgrounds. There is an opportunity for all of us to be more supportive of the team process, by challenging assumptions, providing new ideas, and sharing expertise each time we collaborate. These three things raise the level of individual and group learning and help us create high performing teams. When each individual member adds this type of value, the learning capacity of the whole group increases, and a community of learning is created.

Second, set personal goals. Identify what's in it for you. In middle school, when I collaborated with Claire, my goals were to improve my choreographing skills and increase my creativity. I knew each time we worked together that I would learn something new and walk away with a new perspective. It is important to challenge yourself to develop a skill or build a new point of view during each collaborative experience. As learning professionals we should practice what we preach by utilizing these opportunities to learn on the job. By having an individual mission, you are able to proactively pursue specific learning goals. As a result, you will be an active learner, thus increasing your engagement throughout the collaboration process.

Third, collect lessons learned. Reflection is a major part of the learning; however, it's the part of the process that we focus on the least. Each night, after finishing my sessions with Claire, I would run through our routines in my head, and return the next day with a laundry list of suggestions. I subconsciously recognized the value of reflection. By allowing time to think about your experiences, you give yourself the opportunity to identify what worked, what didn't, and what skills or knowledge you need to develop moving forward. Reflection helps us turn an experience into a behavior change which enables us to achieve a more impactful level of learning.

By rethinking our approach to collaboration, we can more effectively use it as a learning tool. When we add value, set goals, and collect lessons learned, we can kick our current habits and start drinking a new type of collaboration Kool-Aid that supports continuous, professional growth.

Leecey Cameron is a learning specialist at the George Washington University, where she specializes in instructional design, leadership, and program development. She also has experience in training, facilitating and program implementation. Leecey received her Bachelor's in Business Administration from the George Washington University in 2010. She is expected to receive her Master's in Public Administration, with concentrations in education policy and organizational learning, from GWU's Trachtenberg School of Public Policy and Public Administration in May of 2012.

It's Not a Sprint; it's a Marathon: How the Pace of Learning Impacts Retention

Holly Wickter, ZS Associates

Even though you have long prepared for this day, you are still extremely nervous and your heart is racing. All you can think about is doing well and not failing along the way. You see the beginning and start to imagine what it will be like from here on out. You realize you are about to embark on a unique journey that will change your life, from start to finish. Time is your enemy along the way, but the learning experience itself will be worth it in the end. Ready, set, go! Remember, it's not a sprint; it's a marathon. Starting off slow to pace yourself and increase your self-confidence will assist in building your endurance with each new mile marker you pass. Running a race requires structured training, patience and lots of practice, just like when you are starting a new job.

Whether it's your first or tenth, the first day at a new job is a breath of fresh air: new beginnings, innovative thinking and endless opportunities. Structured training and experiential learning are key ingredients to faster on-the-job application and impactful performance. As an employer, experiential learning allows us to tap into a new hire's potential faster. As a new hire, it provides clear expectations of the desired performance, as well as leaving room for opportunities to go above and beyond. The big question is: How are we, as learning professionals, enabling this learning curve when a new hire joins in order to produce a strong performer?

Many companies struggle to find the right balance between content and delivery, especially with onboarding new employees. New employees arrive with varying levels of experience and prior knowledge, which directly impacts the pace at which they can obtain new information and skills. The timing could not be more ideal for learning professionals to truly have an impact on learning than when a new employee walks through the door, laces tied and ready to run.

Several factors influence the amount of content retained through a training program: the learner himself, environment, and time. Every learner has individual needs and is eager to get started and take off running. There are visual learners, auditory learners, and kinesthetic learners, each requiring personalized training plans, just like having a coach and set training schedule. There is also the physical environment in which learning is provided: classroom, online, on-the-job, etc. Just as each runner prefers different conditions in which to train (AM vs. PM, treadmills vs. outside, music vs. no music), a variety of training delivery channels can assist in accommodating different types of learners. Time also impacts retention: two-hour lectures, 20-minute e-learning tutorials, 30-minute small group breakouts, etc. The longer the learner spends absorbing information, the faster they become exhausted. Conducting a needs analysis determines the appropriate timing to offer training, based on when certain knowledge and skills should be performed on the job. Creating learning roadmaps based on this timeline will lay out a training schedule of when certain modules and milestones need to be completed.

As learning is designed, the central focus should be on the learner. The topics should serve as the path to follow, and the blanks should be filled in with exercises, case studies, real world examples, etc. The content needs to be relatable to the skills and tasks the employee will be performing when they are back on the job. When creating that outline, learning professionals should ask, "What do I want them to be able to do when they go back to their desk?" Involving the employee through the learning process, via dialogue, activities or quizzes, reinforces the use of practice and application and leads to greater retention. It is also best practice to provide job aides, cheat sheets, and reference guides to reinforce the lessons after the session has ended.

The first day on the job is extremely critical for new employees, not only because they are eager to begin working and showing off how smart they are, but also because it is the time for them to learn and begin the race to success. They are in this for the long run and need to avoid sprinting to the finish to prevent making a mistake. Preparing a graduated training schedule which constantly challenges employees will help build novices into stellar performers.

A Chicago native and running enthusiast, Holly Wickter started her career out of college at ZS Associates in the Learning and Development department in 2008. Immediately she knew she found her niche with onboarding new employees. Holly has so much passion for her work as she finds it completely invigorating to work with people every day and to watch the impact the learning programs have on the careers their employees embark on.

PowerPoint Does Not Equal Learning!

Bryan McCart, Accenture

In my relatively short tenure as a learning professional, I have seen more than my fair share of bad slides in training content.

What made them bad?

Of course, there are lots of other reasons why slides might backfire but most of the time it's because there is far too much information; good information, but too much.

Why do we put so much content onto our training slides?

The answers may vary depending on the organization, but from my experience, it seems to be for the sake of consistency. After all, you want all of your course participants to experience the same content regardless of the location, faculty or other variables. To do this, we put all of the content that we think is necessary for our learners directly onto PowerPoint slides.

But there are problems with this approach. It quickly becomes too much information to digest. When we put too many important points – or too much detail – on a slide, we can't realistically expect our learners to remember it. If it's important for them to have the detail, consider making it a handout material. Just put yourself in the learner's shoes. When was the last time you walked out of a training session and thought to yourself, "that was a fantastic 8-point font slide"?

Besides, you didn't bring everyone together in a class to just read through bullet points that could have been emailed. You brought them together to interact with each other and with the faculty, right? But when all of the important content is documented and displayed on a projector in the room, it works against the faculty. Instead of using the slide to support faculty as they bring the content to life in a way that only experts can, our exhaustive decks constrain them to a dry and linear lecture.

So, what's the solution?

First, make sure you have faculty whom you trust to teach the material well. If you don't have that, there aren't enough jam-packed slides in the world to compensate.

Second, identify the one thing you're trying to say with each slide. If you can't do that, then you're probably trying to say too much.

Then let the faculty shine. Let them take each key point and bring it to life by sharing their experiences. Bring more discussion to the classroom and engage the learners. In the end, we want participants to leave the session feeling challenged. They will remember a lively discussion or a personal and relevant story that pertains to the course content, but will they remember the slide? Do your PowerPoints support this or hinder it?

Next time you put another bullet point on the slide, ask yourself, "would I want to sit through this?" PowerPoint ought to be our friend so let's not use it to destroy great learning opportunities.

Bryan McCart is a Talent Development professional at Accenture. During his 5 years in the learning industry, he has explored innovative ideas in and around the learning field and their applications to current business needs. Bryan also leverages his user interface design experience to ensure phenomenal experiences as employees plan, manage, and act on their career development goals.

Mirror, Mirror on the Wall … A Best Practice Look at Personal Reflection

Liz Ferreira, MetLife

The Queen in Snow White constantly asked her beloved mirror to tell her who the 'fairest of them all' was. While any fairy tale common sense, developed when you were a child, will tell you she was evil and self-centered, Learning and Development professionals may argue that she was merely asking for feedback … from her reflection.

It is human nature to look for positive affirmation from friends, family, colleagues and leaders; everyone looks to be told that they are smart, funny, attractive and respected. We are taught to expect feedback on job performance. Effective relationships are often driven by trust and the ability to be honest with one another, a form of feedback. Athletes are provided pointers about game time performance; artists on their creativity; and leaders on how they inspire, innovate and drive growth. Yet, often times it is overlooked that a fundamental aspect of our ability to adjust our behaviors based on feedback received is rooted in our capacity to reflect on our own behaviors. Reflection is a key behavior and skill that drives leaders across politics, religion, the arts, literature, etc.

Asking most people to talk about themselves can be challenging. Preparing for an interview or a year-end review can seem daunting. As development for individuals across all roles and industries continue to evolve, we see a shift toward sharing more of what we view of ourselves and how we plan to change not only ourselves, but the world.

You can find quotes from religious icons, poets, presidents, authors and corporate figures on the importance of reflection in leadership. Some call it meditation, others say down time, "me" time, etc. Whichever phrase you may choose to use, the reflection centers around being critical of the most important person you have control over: yourself.

So how do you begin this process? You can start taking notes on the things you see, hear, feel or do. Continuing your journaling, blogging, tweeting or mentor relationships allows time for reflection. However those occurrences may not guarantee that you are reflecting on things you've done well and opportunities to improve moving forward. Below, you'll find an outline of a simple way to begin the positively reinforced reflection process.

A Best Practice for Personal Reflection

A method to better reflect and provide personal feedback is to begin asking yourself the Five Questions of Appreciative Inquiry. This model will allow you to reflect on current practices and situations from a positive perspective.

Find time on a daily basis to jot down notes on any of the questions below. It may be in a journal, a blog, or even on a post-it note. The method you use to track your reflection is not as important as your ability to answer the questions honestly.

FIVE Questions of Appreciative Inquiry

1. As I look back, what has worked really well?
2. Of the things that worked well, what must I remember to keep doing?
3. As I think about the future, what must I do more of than I did before, better than I did before, or differently than I did before?
4. Who will do what by when?
5. Who else should I bring into the conversation?

Building these simple questions into a five minute break in your day will feel awkward at first. In a few weeks, it will become a habit. In a few months, you won't need the set aside time to ask the questions, rather you will build them into your activities and behaviors on a fluid basis. Your ability to reflect and respond to necessary changes will happen inherently. Years down the road, without realizing it, you'll be acting as a leader who is able to not only be critical of others, but critical of yourself.

Consider how fluent we would all be in our own strengths and abilities if we took the time to discover and define them each and every day. Learning from past successes, as well as challenges, allows the time to improve knowledge, skills and abilities. Reflecting on your personal and professional experiences will fuel a desire to change for the better.

Challenge yourself. Think outside the box. Talk to yourself, about yourself. And find the time, as the Queen did, to ask yourself:

" … *was I my best Leader self, after all?*"

Liz Ferreira joined MetLife in 2008, bringing with her a variety of experience in Management and Leadership Development. She spent the first three years of her career at AIG working first in Corporate Training and Development, then moving into International Training and Development supporting the WorldWide Life Insurance distribution channel. Liz holds a Bachelor of Arts in Organizational Effectiveness from Ramapo College of New Jersey as well as her PHR (Professional in Human Resources) certification from the Human Resource Capital Institute.

On the Verge of Vigilance

Rose Benedicks, General Physics Corporation

Business attitudes toward learning are changing. Maybe it's because we have pushed so hard as idealists coming out of graduate school with visions of ROI dancing in our heads. Possibly it's because our bosses, professors and coaches brilliantly started the fight long ago. Arguably, it's because of the economic downswing and spotlight on cutting the fat from financial scorecards. Whatever the reason, businesses are less focused on learning for learning's sake and more focused on learning aligned with the business strategy and measurable returns.

And it's a good thing. Aside from our ideals, as young professionals bridging the gap from theory to practice, it forces us to understand our customers' attitudes, strategies and business needs. The changing focus also allows us to put a meaningful value on what we produce, thus proving our worth and the sustainability of the industry.

To understand what this means for us in the years to come, I find it helpful to know how it happened. Thinking over the past years, it really does seem that the economy was the catalyst causing businesses to seek Six Sigma and lean business processes with more rigor that before. Training departments were under scrutiny. What were they doing? Did they add value? At a fundamental level, everyone knows training is valuable, but wasn't there a leaner way to actually *do* it? Sure. Phase 1: cut out all that costly face-to-face ILT and turn it into WBT. Phase 2: put WBT on the stand and examine what provides ROI and what doesn't. Phase 3: look at what training is getting a return and, of those, identify and invest in those that provide the most or which are best aligned to business strategy.

Of course this happened over years. I was just starting as a technical writer when the push from ILT to WBT was in full swing. What I see now is that businesses actually *need* to know that the solutions we provide align with their strategies and reflect their financial vision and future. It's a beautiful place to be; we more fully understand our own value and more confidently offer that value to our customers.

As for future change, I don't think we are close to changing this newly fundamental attitude toward learning. But we do have challenges that will continue to shape how we (us and the customer) approach learning. Technology, while not a new challenge, presents new temptations. Advances in social media have allowed us to add VILT to our tool belts, and let's face it, some of the social media tools are awesome. They've become an intimate part of our daily routine, and those investing in learning are crying out, "Let's use social media in our next training initiative!"

How will this cry affect where we are now (focused on business strategy) and where the learning field is going? I think we have the chance to fall victim to learning for technology's sake. But we also have the opportunity to figure out how to incorporate social media strategically into our learning solutions. It's our next big wave, and we have a responsibility to our customers, the learning field, and our own worth to ensure we continue on our path of strategic learning while integrating the wonderful newness of technologies.

Rose Benedicks has an M.S. in Instructional Systems Technology from Indiana University. She has eight years' experience developing or managing the development of blended learning solutions, four of which she has spent at General Physics Corporation. Rose has worked with Fortune 100 companies, the VHA and USMC, and private universities. Her experience includes ILT, VILT, story- and simulation-based eLearning and facilitation training. She has worked with marketing and technical content, as well as change management and organizational strategy training initiatives.

Building Training from the Ground-Up

Amber L Aziza, Advance Financial

"From the Ground-up": that's the project I was tasked with when I started in my current position. I was asked to create a training department for a company without any formal training processes at all. While I was quite sure I was not the first person to ever do this, I still felt like an island without hope. I used all of the standard resources; Google, mentors, training websites and books, but it seemed as if there was no documented step-by-step on how to go about building a dynamic training program from scratch.

I soon discovered that the best resource for my daunting chore wasn't found on a website or in a book, it was good, old fashioned "experience". Trial and Error gave me several crucial lessons learned and allowed me to create an in-depth, full-service training department. Here are the four lessons that stand out to me the most:

1. **ANALYZE FROM THE FRONT-LINE**
   My Company consists of a main corporate office and 26 branches throughout Middle Tennessee. When I began my needs analysis of the company, I held meeting after meeting with upper management in the corporate office, asking what they wanted and what they felt training should look like. I then went out into the branches to learn about our products and services the company offered. What I found from just talking to tellers in the branches was so much more valuable than any manager could have provided. Talking to employees and listening to what they said (and didn't say) gave me so much more insight into the first steps needed. The lesson learned for me was to start with the employees first when determining needs, then ask management.

2. **BUILD THE PLANE AS YOU FLY IT**
   Once I knew what training was needed, I was ready to tackle it all at once! I created a training plan which outlined all of the programs and the training catalogs we would have; Continuing Education, General Development, On-Boarding, Continuing Leadership Development and more! Being a perfectionist, I wanted everything in place before training a single class (about a six month process). As some can imagine, having a brand new trainer who wasn't going to train on anything for six months was not going to work, so instead I learned to start basic and train in smaller intervals. I conducted one refresher course on our products and used it as the foundation upon which I built every other program. This allowed me to actually train courses and construct the catalogs as I went along.

3. **YOU CAN'T PLEASE EVERYONE: PRIORITIZING IS KEY**
   Our organization consists of branches and support departments. This meant four different training needs for four different areas. I wanted everyone to feel important, so I made the dreadful blunder of trying to create training for all departments at the same time. After about three weeks of lack of sleep, lack of social life and lack of creative juices, I gave up. I simply could not take on building four quality training programs at once. I felt like I had failed the company and began to question why I took this position from the start. I called a mentor of mine for inspiration and what I received was a scolding. She reproached me for taking on too much and not pacing myself, for trying to make everyone happy, while making myself miserable. After that conversation, I knew I had to take a different approach; I met with the four department heads to determine what the priorities were and what could wait. I then allotted each area a score and based on that score, I placed them in level of importance. I resumed my task, taking each priority one by one and regaining my sanity! I also found that once I presented the priorities to each department, they understood and weren't distressed about the wait for training in their area.

4. **IF YOU BUILD IT, TRAINERS WILL COME**
   For the first six months, I was a department of three: me, myself and I. I needed to show my company the ROI in my department before requesting team members. Once I was able to do that, I had to find members for my training team. I thought that having training experience and the ability to engage a class would be enough. I soon learned otherwise. What I found was that my department was different because our trainers needed more than the average trainer possessed: the skill to take ownership of their role, the capacity to create training from A-Z (or in trainer-speak from A. to D. to D. to I. to E), the aptitude to not just follow processes, but also to create them and the ability to work in a small, yet full service training department. I went through a handful of trainers before finding the right fit for our team. I was able to have a great Corporate Trainer, an amazing Instructional Designer and the best and brightest interns. All have been able to understand their cross-functional positions and take on projects individually and collaboratively with ease.

These four crucial lessons helped me build a top-notch training department from the ground up which in turn has allowed our organization to prosper and expand. Our department is working in full-force now, continuously adding to our now extensive training catalog and helping our employees develop into the best they can be. The best lessons in life are mistakes from which we can learn and I certainly would not have been successful in building our department without several of them.

Amber Aziza resides in Nashville, TN where she is the Director of Learning & Development for Advance Financial Services. She first caught the training bug when she was a freshman attending the University of Toledo, where she majored in Marketing and Human Resources. The youngest of four, Amber cites her parents as her greatest motivators, stating "They always told me that with hard work, you can accomplish anything!"

Social Facilitation: Competition & Evaluation in the Corporate Classroom

Stacey Richter, NBCUniversal

A competitive spirit may be the key to success in business, but how can we harness a healthy sense of rivalry into a return on investment for Learning?

Within the Learning world, we are already tapping into this area of human behavior through some of the most important components in designing a workshop; the practice activities, case studies, and games that act as microcosms for the application of principles being learned. Through individual effort, pairings or teams/groups, a facilitator can use competition as a motivator to increase effort, engagement and even the retention of learning for use in the workplace.

One theory I've studied is Social Facilitation, which occurs when an individual's performance of a task is impacted by their awareness of the presence of others. This awareness manifests in two ways; either the individual thinks he is in a competition or thinks he is being evaluated. In both interpretations, the apprehension felt can lead to an individual being more vigilant and working harder to complete any task. From my experience, as a both a learner and as a Learning professional, I'd like to put forth a new theory, that social facilitation can be a positive motivator for learning and can therefore be used to facilitate classroom interaction as well as increase performance upon return to the workplace.

I experienced the competition aspect of this theory in action when I worked in the Learning Department for two top financial firms that used this sense of competition for the advantage of learning. At one company, client service associates were expected to get certain licenses but were having trouble passing the required tests. I introduced a series of 'study groups' that held participants accountable to each other and then rewarded groups that had the highest scores on practice tests and case studies. Here, competition within each group had individuals spending more personal time studying. And, competition between the groups increased the overall number of individuals who obtained licenses that year.

At the other financial company, the intensive 10-week onboarding program involved each individual having his or her progress tracked and the results of practice activities and learning games scored along the way. The learners weren't just trying to perform at their personal best; they were trying to outperform each other. Their competitive nature was magnified because they were being evaluated by the Learning team, their peers, and their future colleagues, while simultaneously competing at the same tasks as one another.

In both of these examples, the explicit competition was a driving factor in the success of each individual. Longitudinal tracking at each company shows that employees who went through these programs not only perform better immediately follow the training's conclusion, they continue to be top-performers throughout their careers.

Once a learner returns to the workplace, teammates and managers know where the individual has just been and may expect her to behave or complete work in an improved manner. When the individual is aware of this, she may feel as if she is being evaluated or 'watched' - the other form of social facilitation. I can take this aspect of my theory in two directions; either this awareness will lead to the individual performing at a greater level regardless of her application of learning concepts <u>or</u> she is *more* likely to apply the learning concepts she has gained due to the perception that this direct application is expected of her. Being that I want to have a long career in the field of Learning, let's hope with the latter.

Businesses and Learning professionals can use the power of this effect to their advantage by properly harnessing social facilitation theory. If participants' managers and teams are given more information about the workshops their colleagues have just attended, they will know what to look for in terms of improvement. With this awareness, the participants will work harder both because they are under the eye of their teams and because they will want to 'show off' with all of the new practices they have learned.

Learning, as a field of performance improvement, is revolutionized by social facilitation through competition and the power of evaluation. It may seem that I'm implying that the best way to increase learning and return on investment is to increase scrutiny on participants, and therefore increase their stress levels, but I'm not. I truly believe that if we focus this theory in the right way, learning professionals can create positive competitive learning environments where maximum results are achieved and optimistic atmospheres for return to the workplace where return on investment will prove itself in the short and long term.

Stacey Richter is a Learning and Organization Development specialist at NBCUniversal. She has pursued her interest in the field of Learning through roles at Goldman Sachs, Morgan Stanley Smith Barney, Ventureneer, WPP, and Sirius Satellite Radio. Stacey received a Bachelor's degree from the University of Delaware where she studied Psychology and Leadership and a Master's Degree from Teachers College, Columbia University, where she studied Social-Organizational Psychology with a focus in Adult Learning.

Navigating Job Titles in Learning & Development

Rebecca Lockard, Advance Financial

Imagine for a minute that you are at an event that allows you the opportunity to network with fellow learning professionals (not too difficult to imagine, I assume). You strike up a conversation with a fellow Instructional Designer. You are excited to discuss best practices and share successes and lessons learned with someone you feel will have had experiences much like your own. You have the same title, so you would have similar job roles, right?

Well, maybe not. As a young person trying to navigate the industry, one of my biggest struggles has been the inconsistency of responsibilities between the same or similar job titles. An Instructional Designer at one organization may focus on e-learning development. Another may focus little on the design and more heavily on the integration of e-learning courses into the company's LMS. Yet another must be able to design, develop and train courses. I've had similar examples with Corporate Trainers' varying methods of course delivery (full-service or off-the-shelf) and Directors of Learning & Development who have the same responsibilities as Training Managers at other organizations.

So how can we, as learning professionals, navigate through the oftentimes hazy realm of Learning & Development job titles?

To me, there are really only two answers to this quandary. One is to simply place less emphasis on job titles and more on what it is that you do in the learning profession to add value to your organization. I know that we, in the learning profession, love to put labels on things: types of learners, styles of communication, levels of employee engagement, so of course we love to label each other by job title. But so what if your title is "Training Coordinator"? Wouldn't it be more beneficial to enter into a conversation as "a learning professional who assists with the development and delivery of training to a wide audience"? By simply describing what it is you do, you open more doors to more conversations. You wouldn't discredit a fellow learning professional or mentally tune-out of a conversation because that person doesn't have the title you're listening for.

The other, more difficult answer, lies within the structure of the Learning & Development profession as a whole. If you went into an Accounting department at two different organizations, they would probably be doing approximately the same things. If you went into the Learning & Development department at two different organizations, you would most likely encounter two completely different programs with only the basic similarity of training employees. This variance in departments makes it almost impossible to have a job titles that cover the same responsibilities across the board.

So how do we change the structure of Learning & Development to create more cohesion among job titles? Above all, I believe that standards must be set and available for the creation of new Learning & Development programs and roles within Learning & Development. Industry standards are set on practically every function of learning professionals, so industry standards in job titles seems like a logical next step. Surely there are thought leaders out there in the Learning & Development profession that would like to tackle this massive undertaking?

So while those standards are being developed I'll leave you with this:

I am a learning professional who designs and develops both classroom and e-learning courses. I am part of a full-service Learning & Development department, and about 80% of the materials we teach are created in-house. I am responsible for facilitating when necessary and also have managerial responsibilities. What is my job title?

Rebecca Lockard is a native Nashvillian and loves the Music City! She has 4 years of Learning experience and first caught the learning "bug" upon graduation from Martin Methodist College where she majored in Business Administration. She is now the Instructional Designer at Advance Financial and just celebrated her 2-year wedding anniversary with Mark Lockard on Halloween day.

Learning in Asia - “Same Same, Yet Different”

Hsern-Wei Ling, PwC

From where I sit typing this, 10000 miles away in Malaysia and with tropical rain lashing at my window, I’m amazed that in the past month I’ve been connected with many of my 30 under 30 peers on LinkedIn. I keep track of Learning 2011 design updates on my iPad. I’ve listened to a WebEx recording between Elliott and the group. I get regular conference updates on Twitter, and I’ve literally just downloaded the Learning 2011 app, which looks like it’s going to allow me to do all of the above - and more!

Technology has allowed me to keep in touch, real time, and with one click, one app, one device - many barriers that used to exist simply have disappeared. Apart from the 12 hour time difference, I have had access to the very same resources as if I had been in Los Angeles.

I’m not unique of course; many of my peers in Asia are hyper connected. They spend many hours on social media and are gadget and tech savvy. Asian social media adoption rates have surpassed the West and by 2012, the region will account for nearly half of all internet users globally (ESOMAR *Research World, 2011).*

The learning industry in Asia is growing. While the company I used to work for in the United Kingdom is facing cuts in training budget and spending, in Asia, corporations and governments are looking to become competitive in the global landscape in a highly compressed time frame. To do this, they are investing money to develop human capital on a corporate and on a national level.

In this changing global learning landscape, here are a few thoughts that I am considering:

- There are profound differences in learning cultures that stem from different ecologies, social structures, philosophies and educational systems. Many of the mental frameworks which frame current development practice do not take into account the difference in perceptual and cognitive processes between cultures. For example, active learning (e.g. adult learners being in control of their own learning, open discussion, debate), a key approach, often goes against the grain for a learner in the East. One explanation for this is the deep intellectual inheritance in the West from the Ancient Greeks, who valued and encouraged debate, versus the inheritance in the East from Confucianism, which encouraged self-control and harmony.

- When operating in Asia, it is important to be mindful of learning readiness. What I mean by this is that, in general many do not place as high an importance on personal responsibility in learning as compared to in the West. When providing learning solutions, it’s important to consider readiness for it as this has implications on how ‘on-the-job’ solutions are designed.

- Technology is going to be key. The adoption of new technology is rapid and yet, there is a huge gap in expertise in learning technology in Asia.

- As technology makes the world smaller and large multinationals expand and design learning interventions for a global audience, it’s becoming increasingly important to engage with global partners in design and in learning interventions or there is the risk of being irrelevant. This struck me when I was in New York recently on a global secondment with PwC. We were there to build a development curriculum for our Onboarding. Around the table were team members travelling in from Mexico and all the way to Australia. There was a moment early on in the project, as we were having a discussion, when we realized that we all had our own definition for a ‘coach’ – it was an ‘aha’ moment. A moment when I realized that if we were not seated around the table, it would have been so easy to design something that would have been out of context for many.

Perhaps the biggest thing for me is that there is so much to learn from each other. In an increasingly globalized world, it's so important to 'sit around a table' and consider perspectives we wouldn't have done before. So I invite you to do so with me and I hope to do so with you at Learning 2011 and beyond. Happy Learning!

Born in Wales, Hsern-Wei Ling then grew up in Kuala Lumpur and went on to spend 8 years in London learning about life. He has a BSc in Psychology and an MSc in Occupational Psychology. In London, Hsern worked for a Business Psychology Consultancy followed by Common Purpose, a Leadership Development organisation. In early 2010, he relocated from London to join PwC in Malaysia. His long-term aspiration is to be involved in human capital development on a national level in Malaysia. Out of work, Hsern managed to appear on the news, learned how to make an 'extra hot – wet - triple shot –venti – caramel - cappucino with soy milk' at Starbucks, ran wine education 'learning' groups and ran the odd part marathon.

Measurement & Motivation

Luke Parnham, State Farm Insurance

As humans, we are always learning, every day, whether we are cognizant of it or not. The minute we get out of bed each morning, we learn things about ourselves, politics, our community, technology, and on and on. We are constantly learning about the world in which we live. The motivation and intentionality behind our learning is fueled by some sort of desire. If we learn x, then we can do y. This is because we know the outcome will benefit us and provide value.

Corporate training programs are not always fueled by the learner's desire. Typically, they are a requirement for a job, an annual "refresher," or something recommended by someone else. This often results in low motivation for development and ritualistic training programs. This can be offset when we measure training impact. When we are intentional about learning new things and developing ourselves, we know that there is an outcome that will benefit us. For example, one might choose to go to college because of what data proves about college graduates' job security and income levels.

If there were no data to support the benefits of pursuing college, we wouldn't have very many graduates. If we forced people to attend college but had no data to prove the value, we would taint learners' views of our education system. The reality is that, training needs to be linked to outcomes. Learners need to understand the outcomes so they have the desire and motivation for development.

How many training programs in your organization have specific measurements attached to them? If the list is short, your learner audience may not be motivated and may not have a positive outlook on training and development. How do you know the ROI for your training investments? When you have a new employee on t the sales force complete a curriculum on your sales processes and strategies, are you quantifying the impact of the training on results? If not, it could mean that the curriculum has existed for several years and that is just "what we do." On the other hand, the training could be producing business results but no one is paying attention or attempting to measure the impact.

If training is mandatory, measurements are needed. If training is optional, measurements are needed. Why? Results motivate people! As a learner, I want to know why I am being mandated to complete a course. I want to know what I'll get in return for this significant investment of my time. As leaders, we want to know if our training programs are providing any value to the organization. This will help us invest strategically and focus on areas of impact.

Measurement is part of our everyday lives. From sports to banking, measurement is necessary to make sound business decisions. As learning professionals, we must ensure that measurement is incorporated into our training programs. Training measurement helps ensure we are focused on the right training at the right time for the right business results.

Luke Parnham graduated from Trinity International University in Deerfield, IL with a B.A. in Organizational Development. Luke has a passion for strategic business operations. He began his career as a project management consultant where he implemented project management processes and methodologies. In his current role, Luke has implemented a training measurement strategy and strategy execution system to integrate strategy development, business planning, and measurement. He is passionate about measuring training in order to operate strategically.

Checklists and the Future of Organizational Learning

We have an intriguing opportunity to address learning challenges in our organizations: use checklists! Checklists are powerful tools: not just some "old-fashioned" method for things used to be done, or something we use "backstage" to manage the production of learning activities. Rather, checklists can have an extraordinary impact on individual performance and organizational outcomes. Consider these examples:

- Pilot Sully Sullenberger successfully landed USAirways flight 1564 in the Hudson River after colliding with a flock of geese while taking off from La Guardia Airport. Two hundred and eight seconds after the impact, which caused both engines to fail, he and his first officer had completed the third of three checklists that enabled them to safely land.

- Dr. Pronovost successfully eliminated deaths from infections in intensive care units. A checklist consisting of five elements used before inserting the IV was the reason for success. His work is credited with saving 1500 lives and $100 million in the State of Michigan over an 18-month period.[i]

- Billy Jones, a new hire at the neighborhood fast food restaurant, became an integral member of the team soon after he was hired. The restaurant performance support system provided him the checklists he needed to consistently perform his food preparation job well. Staffing shortages had made it difficult to keep up with demand at this popular establishment before his arrival.

In each case, the checklist is simple but had a significant impact (see The Pronovost Checklist).

The Pronovost Checklist

1. **Wash hands** with soap and water or an alcohol cleaner.
2. **Wear sterile clothing**—a mask, gloves, and hair covering—and cover patient with a sterile drape, except for a very small hole where the line goes in.
3. **Clean patient's skin** with chlorhexidine (a type of soap) when the line is put in.
4. **Avoid veins in arm and leg**, which are more likely to get infected than veins in chest.
5. **Check the line for infection** each day and remove when no longer needed.[ii]

Two years ago, Atul Gawande wrote the compelling book *The Checklist Manifesto,* which highlights the significant impact of checklists in enabling individuals and organizations to succeed in complex situations. In the book, he notes that checklists "supply a set of checks to ensure that stupid but critical stuff is not overlooked and they supply another set of checks to ensure people talk and coordinate and accept responsibility while nonetheless being left the power to manage the nuances and unpredictabilities the best way that they know how."[iii] He illustrates how developing a "checklist mentality" has had a profound, positive impact in several fields, including aviation, medicine and engineering.

Why not use checklists to provide learning in our organizations? For our part, as learning professionals, we are accustomed to having a "checklist mentality" in performing our work. Though our experiences may vary, checklists are used for a variety of tasks that we perform, including planning, quality assurance, project management, instructional design, resource management and so on. Many learning organizations also have a "checklist mentality" around developing their learning professionals. It is not uncommon, for example, to have a checklist associated with preparing subject matter experts - who come from other parts of the organization, usually without a learning background - to perform, whether it be in the classroom or online. Our use of checklists with learners has also grown. For example, we have developed checklists to evaluate learner readiness and completion of learning.

<u>Framing the Value Proposition of Checklists for Learning</u>

In framing the value proposition of checklists for learning – a "checklist mentality" if you will – let us first consider several important learning imperatives that enable the success of our learners and organizations. These imperatives share a common characteristic in that they are applicable even when we have very intelligent people who may have received substantial training. In each case, an interesting paradox emerges and contributes to the complexity of our learners, providing an opportunity for us as learning professionals to make an impact.

<u>The Knowledge Learning Imperative</u>

One imperative is to ensure that the learner has the right knowledge at the right time and is able to use it in the correct way. One of the amazing paradoxes of our time is the large and ever increasing volume of available "knowledge"; yet, in our organizations, we still see missed opportunities because we did not "know." We can think about this imperative in two ways:

- Having the knowledge. This is about having the right knowledge at the right time. In the information and technology era of the early 21st century, we know and have access to more knowledge than ever. And yet, two problems still exist in our organizations: gaps in knowledge and the ability to sift through it to make appropriate decisions about what is correct.

- Using the knowledge. Really, this is about applying the knowledge. Individuals may have near perfect knowledge but the organization does not have access to it or fails to apply it correctly. This can occur for a variety of reasons, such as stress and distractions.

The implication for us in the learning field is that we have two challenges. The first is one that has existed for many years: to serve as the purveyor of knowledge. The second is to help our learners cope with the volume of what they can – and should – know.

The Collaboration Learning Imperative

Another imperative involves supporting our learners' ability to effectively collaborate with each other around knowledge and expertise. Another amazing paradox of our time is that, with the greater connectivity we have with each other – or can have with more tools available than ever – we don't more fully leverage the power of collaboration. There are several aspects to this imperative as well:

- Knowing to collaborate. This gets at the necessity to collaborate. Factors that impact this include intentions of individuals to withhold or share knowledge, clarity of organizational expectations about sharing, and perceptions that there isn't enough time to collaborate.

- Knowing how to collaborate. This is the lack of ability of the learner to collaborate effectively. This can result, for example, from a lack of knowledge and skill about how to approach someone, permission to step outside departmental boundaries or the tools that enable connection to share knowledge, thoughts, expertise and ideas.

- Knowing who to collaborate with. In this case, there is insufficient awareness of who else should be involved. This can result from an incomplete network or lack of understanding of the roles that others play, for example.

The implication for us in the learning field is that there are several challenges where learning can play a role. These challenges range from organizational awareness and cultural expectations to a clear sense of the skills learners are expected to develop in order to be effective collaborators.

The Problem Solving Learning Imperative

A third imperative is to help learners be effective at solving "real world" problems in real time. This pertains to how they apply knowledge, whether individually or collaboratively. Yet another amazing paradox is that, despite more knowledge and a greater emphasis on collaboration, we still struggle to solve important albeit complex problems. There are several aspects to this imperative as well:

- Lacking a common language or framework. Ultimately, solving complex problems requires creative and innovative thinking. Organizations that specialize in developing products that solve complex problems share a common thread. They have a common framework and language they use to integrate the solution process.

- Lacking a clear problem definition. In some cases, there is not a common understanding of the problem to be solved. This can occur, for example, either as a result of insufficient or overwhelming amounts of knowledge that confuse the situation.

- Lacking common experiences. This aspect impacts group problem solving. Common experience often aids idea generation and individual performance in group problem solving.

The implication for us in the learning field is that there are several challenges where learning can play a role, the most obvious of which would be to help our learners develop a common framework and language that they can apply to organizational problem-solving challenges. We can provide opportunities for learners to have experiences that can be applied in new problem-solving situations.

The Value of a "Checklist Mentality" in Learning

With these imperatives in mind, let's next consider the attributes of good checklists. In so doing, we see the value they bring to the learning world. An industry that is, of course, well known for checklists is aviation. Daniel Boorman of the Boeing Company, who has spent some two decades studying the effectiveness of and developing checklists for Boeing aircraft, is an expert on the topic. He provides significant insight into the affordances that checklists provide to learners and to their organizations:[iv]

- Checklists reflect a philosophy. "When you get into a Boeing aircraft, there is a theory that governs the way your cockpit crew flies the plane – what their routines are, what they do manually, what they leave to the computers, and how they react when the unexpected occurs." In short, checklists convey the approach one should take in doing the task consistently well.

- Checklists simplify complexity, when done well. "Bad checklists are vague and imprecise…too long…hard to use…impractical for the situation...treat people as dumb…turn people's brains off rather than turn them on." In contrast, "good checklists are precise, efficient, to the point, and easy to use even in the most difficult situations. They do not try to spell everything out…they provide reminders of the most critical and important steps – the ones that even the most highly skilled professionals using them could miss." In short, checklists are simple, short and practical.

- Checklists have important though limited power. Checklists "help remember how to manage a complex process or configure a complex machine. They can make priorities clearer and prompt people to function better as a team. By themselves, however, checklists cannot make anyone follow them." In short, checklists support the user, particularly when dealing with a complex situation, and when multiple people need to work together. Indeed, this may be the only way to support the user.

Several important parallels to the needs of our learners emerge from these points. It is not much of a stretch to see, for example, the need to instill and support an operating philosophy in how we develop our employees to perform their work consistently well, the need for precise and efficient tools to remind them of important and critical steps, and the need to support them in making priorities clearer, enabling them to function more as a team.

Overcoming Reluctance to Use Checklists

To be sure, there are doubters about the efficacy of checklists. Skeptics may see them as limiting, time consuming or making things more complicated than they need to be. They may even see checklists as superficial, programmatic, getting in the way of flexibility or the need to react to circumstances in the moment.

Checklists actually bring a unique balance that addresses these concerns. In reality, too much structure or too much flexibility are more likely to lead to failure or the inability to cope with complexity than balance. In fact, checklists offer a unique means to provide balance in at least two ways that are relevant to learning: structure-creativity and risk-opportunity. In so balancing these dualities, we have the opportunity to learn and perform better with than without a "checklist mentality" in the midst of the complex world we live in. To think about this, let's come back to two examples from the beginning of this essay.

Structure-Creativity

Checklists help balance structure and creativity, even in a highly time-constrained crisis situation. Sully Sullenberger, the pilot of USAirways flight 1565 on January 15, 2009, successfully landed his Airbus A320 in the Hudson River with no loss of life and few injuries about three minutes after losing both engines while climbing out from the airport. What makes this particularly remarkable, as Sullenberger later shared, is that water landings are not something pilots practice, even in a simulator. This was the first time he and his co-pilot had done it. That is, he and his co-pilot had to literally learn in the moment – working together – how to successfully land in the river.

As we said earlier, in the last 30 seconds before hitting the water, he and his copilot pulled out the third of the three checklists that they went through between losing the engines and landing. In an interview with Elliott Masie at Learning 2009, Sullenberger stated that the checklists did several important things. For one, they allowed focus on what was important when the plane was yelling at them from all directions with lights, buzzers and audio warnings. They also gave him and his copilot a common framework for how they thought through this challenge and a common language to communicate during this obviously time-constrained experience. Just as important, he said that they were then able to innovate in between the steps of the checklists, know what they were going to do next and know what each of their jobs were as a result of the checklists.[v]

Risk-Opportunity

Checklists provide the opportunity to be successful in seemingly daunting situations, balancing risk and opportunity. Dr. Pronovost, a critical-care specialist at Johns Hopkins Hospital, used checklists to address a very serious problem. People were dying from infections that they did not have when they entered the operating room in the intensive care unit (ICU). Rather, the infections developed in the hospital. He was looking at a specific type of infection that was caused by IV lines. Infections were occurring in over 10 percent of patients.

Dr. Pronovost took a step back and asked what five things could the medical staff in the operating room do to stop these deadly infections. In the process of answering this question, he learned that there were some very simple things that, when done, stopped the infections (see checklist example at the beginning of this essay). By going to a checklist that included these elements before inserting the IV line and stating out loud that each of the items on the list was done – fostering a mentality of always using the checklist – he was able to dramatically reduce the infection rate. As result of his work, *Time Magazine* named Pronovost one of the 100 most influential people in the world in 2008.[vi]

How a "Checklist Mentality" Can Make a Difference in Learning

With these principles in mind, and recognizing the impact that checklists can have, let's now explore how a "checklist mentality" can make a difference in learning. To do so, we will use some simple scenarios taken from the viewpoint of learning professionals in various industries. In each of these scenarios, you will observe an opportunity for checklists to support learning in a unique way that helps the learner deal with complexity (see table "Checklist Mentality" Examples, located at the end of this section). You will also observe that the checklist is delivered to the learner in different ways to take advantage of technology affordances.

"Checklist Mentality" for Learning: New Employees at a Technology Company

The learning manager at a large technology company needs to bring new employees onboard as quickly as possible. Specifically, she has one day for new employee orientation, including time to discuss benefits as well as orient new hires to the organization. While she understands these constraints, she thinks one day is inadequate but has been unsuccessful in receiving more time. Her biggest concern is that the company's culture is highly collaborative and emphasizes the importance of inclusiveness, particularly in the product development phase of production.

The learning manager sees this as a collaboration learning imperative. The orientation does nothing to support the new employees in learning and understanding the collaborative nature of their culture. The learning manager wants to provide opportunities for the new employees to both learn more about the organization's culture and to begin to develop a network that will be critical to their ability to succeed. Ultimately, this would address important gaps in their learning by increasing their understanding of "how things really work here." If done well, this approach would also provide the opportunity to be successful sooner.

The learning manager develops a checklist to address this learning gap. The checklist, which is contained in a high-quality printed brochure and includes a welcome note from the company president, consists of six activities to complete in new employees' first month at work. First on the checklist is a visit to the entry foyer where the company shares displays and short vignettes about how it has successfully used collaboration to innovate some of its most profitable products. The checklist also contains several interactions, including two conversations with senior managers from different parts of the organization to hear them talk about the importance of collaboration and give personal examples from their careers, and a social event to connect with other new employees to discuss the first weeks of their assimilation into the company. Also, the checklist contains two blank lines that enable the new employees to personalize it by adding two activities of interest based on a list of recommendations. Introducing the "checklist mentality" into new employee orientation has an added benefit: new employees routinely create their own checklist of collaborators for their projects, ensuring the more robust interactions that the company expects.

"Checklist Mentality" for Learning: Medical Processing Personnel

A learning vendor in the medical profession is responsible for working with staff in medical facilities to ensure that they are able to perform all necessary tasks with the vendor's software. For example, the software is used for registering patients, tracking the associated medical information, appointment scheduling and tracking diagnostic tests. The responsibilities and specific tasks, however, are role based. That is, each member of the staff must learn to perform different tasks with the software. Complicating this desired learning outcome is that it is not a pure process. There are various policies that come into play depending on the specifics of each individual patient's case.

The learning vendor sees this as a knowledge learning imperative and introduces a "checklist mentality" that helps in two ways. First, in the software, the checklist provides the learner with a complete list of tasks that they are expected to perform, specific to their role. In addition, the checklist enables the learner to validate – and later revalidate – that he/she can perform all tasks. This is particularly helpful for tasks that are performed less frequently. The checklist also helps the learner to address the policy concerns associated with the various functions by integrating specific issues into a supporting checklist.

Ultimately, there are several checklists involved so that each is not overly complicated. These checklists reside on the tablets learners use for their jobs, making them easily accessible. The "checklist mentality" is reinforced as learners use them to self-evaluate their ability to perform each task as "Never done this", "Can do with help", "Can do alone", and "Can do and help others". This approach provides insight into particular tasks that are performed less frequently and may be forgotten. In so doing, periodic learning reinforcement can be offered to learners to better maintain their proficiency. As a result, the medical staff is more competent and confident in working with the patients and doctors they support.

"Checklist Mentality" for Learning: Hotel General Manager at a New Property

The Director of Learning and Development for an international hotel chain faces the challenge of supporting general managers' learning when they start at new properties. Though experienced as managers, there is much to learn that is unique to each property: information that training classes do not address. She is looking for a way to provide learning that will make managers' transitions efficient and effective, given the importance of teamwork and collaboration among hotel staff at every property.

The Learning Director sees this as a collaboration learning imperative. Specifically, properties are managed "locally", meaning that there are variations in work processes, roles/responsibilities and staffing, depending on a variety of factors like size, location and customer demand. Experienced managers arrive with the knowledge of how to manage a property, but they don't know the staff members, the specific responsibilities that each person has and how they team to perform their various tasks.

To address this, she works with the staffs of the various properties to develop property-specific checklists with key personnel the managers should meet with when they arrive. The checklists at various properties vary in length, but are short and include some common elements. All checklists include a list of key personnel, for example. This takes the guesswork out of sequencing initial conversations and ensures that productive interactions occur. And, this certainly helps ensure that balls don't get dropped. The checklists are periodically updated when there are changes at the property in staff or process. Also, the checklists are provided to the general managers using an "app" on their smartphones, making them easily accessible. The result in this case is a smoother transition and less potential for disruption.

"Checklist Mentality" for Learning: An Analytic Team in Government

The staff of a learning unit embedded in the analytic function of a government organization is called on to address a performance gap. The analytic unit has a good reputation for its highly skilled analysts. On a number of occasions, however, analysts "missed the mark" with their analysis. The learning staff assesses that it has clearly been effective in delivering skills training, but recognizes that something has been missing. Given the importance of this unit's work in supporting the formulation of government policies, such failures are of significant concern.

The learning staff comes to realize that this is a problem solving learning imperative. Digging deeper, they discover that there are a variety of analytic frameworks that could be used for analytic projects. In cases where analysis "missed the mark", the learning team discovers that there were better options for analytic frameworks that the analyst could have used to analyze the data. Using a more appropriate framework would have produced a better analytic product.

The learning staff works with the analysts and managers to develop a checklist to address this issue. In discussions with analysts and managers, the learning staff determines that there are currently eight different frameworks that are applicable to their work. Not all analysts have been aware of this fact, highlighting the problem. The learning staff develops a web-based checklist of frameworks to be considered when developing each piece of analysis. It becomes known as "The Analyst's Toolkit." Analysts use the checklist to be sure that they consider each framework before selecting one. Furthermore, each checklist item has a link to another webpage that explains the framework in more detail and provides tools for employing the framework. The unit has already seen a higher success rate.

Table: "Checklist Mentality" Examples

Learning Imperative	**Types Associated with Learning Imperative**	**Paradox Contributing to Complexity**	**Implications for Learning Professionals**	**"Checklist Mentality" Examples *(from the scenarios)***
Knowledge	Having the knowledge Bringing the knowledge to bear	The large and increasing volume of available "knowledge," and yet they still miss opportunities because they did not "know."	Help learners cope with the volume of what "they know" and apply it effectively.	Role-based task checklist with self – assessment (*on a tablet*).
Collaboration	Knowing to collaborate Knowing how collaborate Knowing who to collaborate with	The growing options for tools that have us more connected than ever, and yet they miss opportunities as result of a lack of collaboration.	Help learners understand expectations about collaboration and how to do so effectively (tools and skills).	Checklist of experiences to extend onboarding (*paper-based*). Checklist of primary points of contact to meet with (*on a smartphone*).
Problem Solving	Lacking a common language or framework Lacking a clear problem definition Lacking common experiences	The knowledge and a greater emphasis on collaboration, and yet they still miss opportunities to solve important problems.	Help learners have a common framework and language to apply effectively in problem-solving.	Checklist of frameworks to consider in problem solving (*web-based with drill down links*).

Trends Supporting a "Checklist Mentality" in Learning

A number of important trends that support a "checklist mentality" are occurring in the learning field. These trends relate to current technology, the needs of the learner and new approaches by organizations to provide learning opportunities.

One trend to highlight is the growing variety of technologies on which we can make checklists available. Our image may be of the old-fashioned paper checklists, and while they may still be valuable, interesting alternatives exist. Leveraging existing and emerging technologies offers significant affordances, such as making checklists updatable, more accessible and easier to use. In the analyst team scenario, for example, use of a web-based checklist allowed for links to deeper content. The checklist designer kept the checklist short and precise, while affording the learner more content if needed. Also, the checklist "app" on smartphones for the hotel general managers allowed for easy access and frequent updating. As a result, the checklist becomes more practical and useful.

Another trend is the move toward learning that is shorter, faster, and integrated into work. We are seeing shifts in the expectations of how learning is delivered in our organizations based on business imperatives, learner expectations and time pressures. In all four scenarios described previously, the checklist provided a sound complement – and in some cases alternative to – formal learning. For example, the analyst team did not need a class on analytic frameworks, they simply needed to be aware of and have access to content on all frameworks when making a choice.

We are also seeing greater learner desire for familiarity and autonomy. In a world that is already complex, our learners don't want to have to "learn" how to use learning resources. Therefore, to the extent that it's possible, we should provide impactful learning with simple-to-use delivery mechanisms. At the same time, checklists developed using the principles discussed provide a learner who is seeking autonomy the confidence that those checklists address their learning needs. For example, in the instance of the medical staff learning their vendor's software, checklists provide autonomy to each staff member as they learn their role, as well as opportunities to assess their own competence.

A final trend to highlight is the emerging adoption of performance support for learning. Performance support consists of tools that the organization provides to prompt, support and provide feedback to learners on the job. Indeed, at The MASIE Center, we are excited about this area of learning. We think about performance support through the metaphor of a GPS used in a car to help you navigate and arrive at a chosen destination. It is not a stretch to see that following a GPS is not unlike following a checklist of steps to reach a certain goal. The growth of performance support systems will provide the opportunity to integrate and more widely use checklists as part of this learning process.

<u>Broader Impact of a "Checklist Mentality" in Learning</u>

Checklists are not the answer to every learning need, but they do offer a unique capacity to simplify complexity and help the learner focus on those things that matter most. In that regard, checklists are simple but impactful. At the same time, when used appropriately, by their nature checklists provide affordances sought by learners, like focused, short and just in time learning. Also, when consistently used to build a "checklist mentality," the potential for broader organizational impacts emerge, furthering the benefits of learning. These benefits could include:

- Reinforcing the philosophy and supporting the consistency of how work is consistently well performed.

- Ensuring that all involved in the work have a common language with which to communicate.

- More effectively leveraging the knowledge and expertise resident in the workforce.

As with the learning professionals in the scenarios discussed in this paper, the opportunity to impact learning in this way using checklists entails imagination and design. Remember the first scenario about onboarding new employees? Those learning professionals came up with an innovative, well-designed checklist that extends the onboarding experience in an impactful way (see Learning Checklist Exemplar: New Employees at a Technology Company). To achieve this, one must imagine what is possible with checklists for learning and how they fit into broader learning needs. Then, design to optimize the unique benefits that checklists offer. Finally, this opportunity requires a combination of imagination and design to integrate checklists for learning into the technology and learning platforms available to the learner. Blending these with the simple yet powerful nature of checklists can result in impactful learning opportunities, especially when much is at stake for the learner and the organization.

Learning Checklist Exemplar: New Employees at a Technology Company

Welcome to Technomics Corporation! We are delighted to have you join our organization. I look forward to meeting you and wanted to be among the first to say hello! We are an organization that is proud of our tradition of working together to develop products that make a difference in the lives of those who use them. We are providing this checklist as a way to help you learn about our organization. As part of completing it, you will meet Karen Smith, Vice President, Marketing, who has been with Technomics for 25 years and has worked throughout our organization. She brings a wealth of stories from different parts of our company. And, you will meet Mary Smith, Vice President, Commercial Division, who joined Technomics 4 years ago. She is an accomplished manager with 30 years of industry experience. She shares stories of her experience in becoming a part of our company. Warmest regards, Bill Bill Jackson President and CEO	[ ] Front Foyer. Visit at least one product development display to learn about the development process and impact of our work. [ ] Vice President, Marketing. June 12 at 2:00 pm in room 145. [ ] Vice President, Commercial Division. June 25 at 10:00 am in room 219. [ ] Recommendation Choice 1. Choose one item from the list provided in your Technomics Orientation. [ ] Recommendation Choice 2. Choose one item from the list provided in your Technomics Orientation. [ ] New Employee Social. An opportunity to meet others who have joined us this month. Hosted by Harry Barker, Director of Hiring. June 30 at 10:00 am in room 300. Welcome!

Bob Baker now works as The Learning CONSORTIUM's Chief Learning Officer and was previously the Deputy Chief Learning Officer at the Central Intelligence Agency. He had spent nearly two decades of his 31-year Agency career in the learning field as an instructor, learning manager and corporate leader. His work focused on learning related to leadership development, instructor development, intelligence related substantive issues, employee onboarding and the learning strategy. He is known as an innovative leader who has successfully delivered on multiple initiatives to advance learning impact in the CIA. Prior to his work as a learning leader, he served as an analyst and manager in the CIA's analytic function.

Why Learning is Out of Control in Most Successful Companies

Nigel Paine, MASIE Learning Fellow

In my experience, unhappy or frustrated staff members never innovate and always keep their creativity to themselves. I have found a rather large group that agrees with me: 83% of CEOs in Europe and the U.S. who were interviewed by PricewaterhouseCoopers. When asked to identify their number one priority, they claimed that focusing on talent this year and next year is necessary and productive. While there is hardly a chief executive in the world willing to admit that he or she has no interest whatsoever in the people employed by his or her organization, it is a big shift for such a large majority to be focusing on retention and attraction – and for good reason.

If putting people development at the top is a first-time occurrence, it is an earnest and unambiguous concern, indicating a significant sea- change in three ways. The first clearly indicates that the CEO is taking on the people mantle, rather than leaving it to the Human Resources Department. Secondly, it reveals that we are moving beyond platitudes such as "our people are our greatest asset" into robust policies to support, foster and grow talent. There is a universal talent shortage that is growing, and companies are clearly beginning to feel the heat. Lastly, it points to the fact that there is an increasing belief that people development and talent management strategies are capable of delivering tangible, bottom-line benefit back to the company and are necessary to attract and retain key personnel. Talent development/management is no longer seen as a luxury in times of plenty, but as a necessity for survival in an increasingly turbulent environment.

One obvious conclusion from this research, and many other parallel indicators, is that learning's status within companies is rising; with it rises the learning professional's status. This is welcomed and feared in almost equal measure by staff, who should be bathing in reflected glory. Their anxiety is largely due to the change in emphasis that dictates a change in role and behavior, which leads to an increase in profile and visibility. This can be career enhancing or career limiting, but this is no temporary shift or fad. It's an indicator of a profound change taking place in the DNA of many organizations. A similar occurrence happened when IT went from marginal to structural and strategic. This, in turn, caused the downfall of the first generation of "amateur" heads of IT, who came from elsewhere and had an interest in IT that was usually developed outside the corporate environment. They were replaced by chief technology officers, capable of delivering on the significant investment needed to change the way companies were run, building robust and reliable platforms on which massive and complex enterprise applications could be deployed.

IT shifted from being a business tool to a transformative force that affected the way businesses were fundamentally aligned. The existing non-IT based systems were replaced and IT became the core, indispensable way of organizing the workplace. There was a shift from stand-alone machines to a network. Early adopters had the freedom to customize their desktop PCs and choose their personal applications alongside core company software. That freedom was replaced by enterprise desktops and software selected and installed over the head and permissions of the individual user, locked in by an impenetrable firewall and security concerns.

In a similar way, talent development will move out of the direct control of HR into the realm of individual divisions, departments or work units. It will cease to be a tactical, day-by-day concern and become a strategic corporate obsession. Learning programs will no longer be based on what particular learning teams wish to deliver, but on core corporate needs. It follows, then, that individual personal and professional development will shift from the whim of an individual line manager, who may or may not care about said development, into a consistent whole-company and whole-employee approach. The impact and return on investment will be looked at very broadly. Like what happened to those early adopters of IT, who made the investment ahead of the majority, the early movers in people investment will reap disproportionate rewards in terms of retention of key people, increases in productivity and that critical intangible: a marked increase in discretionary effort by staff. This will lead to an explosion of innovation and creativity.

The impact in business terms will be percentage point improvements in performance, year on year, and the systematic development of a culture where people really matter all the way through the organization and right to the top. This will change the learning operation and its staff forever. No longer in the margins and seen as a cost, they will be center stage and delivering a sizable return on investment.

These shifts in the roles of learning professionals can be slotted onto 10 axes that reflect wider changes in leadership style and approach. They also pin down the changing nature of the leadership role.

- From direction to facilitation
- From controlling to enabling
- From only formal to a mixture of formal and (increasingly) informal learning
- From separate to incorporated
- From limited involvement, largely by learning professionals, to wide ownership at the highest level of the company
- From tactical to strategic
- From a focus on getting it right to a focus on getting it out
- From single platform to multiple platforms
- From developing courses to building learning environments
- From “happy sheets” to analysis of business contribution

This will occur within an overall financial framework that shifts from seeing learning as an overhead cost to seeing it as an investment that will deliver a substantial return.

Just as a successful marketing department understands the product and the customer, the learning leader will understand the needs of the business, talk the language of the business and be able to operate comfortably alongside the executive team as important, strategic goals are decided.

The impact on the individual employee will be profound. Each will clearly understand his or her contribution to the success of the organization and have a career plan. Each will be expected to move forward, year on year, in terms of personal development, understanding of the company and overall contribution. He or she will expect to move from job to job in order to gain experience and be charged with self-development and setting a personal direction. His or her aspirations will be expand beyond any previous boundaries and generate ideas.

The only way to manage all of this is by reinventing the business computer. We need to make it a digital workspace where access to expertise, formal learning, contacts and colleagues, as well as work flow, will be held together in a single portal with no discernible difference in accessing Internet, Intranet or local information, and where applications are a single click away, depending on the nature of the task in hand. Underpinning this will be the complex data management task that will track throughput and progress so that this data can be integrated into all of the stored people metrics.

This all seems very "high end" and the domain of only the very large corporate or large government departments. In the past, that may very well have been true. But this new emphasis on "the people contribution" has been matched by a revolution in personal space on the home desktop. Social networking tools like Facebook and Google+ have their counterparts in every aspect of an individual's online community life, from sharing photos (Flickr), videos (YouTube), trips (Dirtball), journals (Blogs), articles (Digg), websites (StumbleUpon) and incidents (Twitter), to self-generation of communities of interest (Google+ again!). Out of these countless, small, web-based applications, the individual can build a unique combination of technologies that defines how he or she wishes to be seen and communicate. This includes a personal learning environment that, in some way, helps shore up our chaotic world into structured and unstructured learning and communication. These tools are at the disposal of any organization and many can be deployed on Intranets as well as the Internet.

The missing element is the underpinning data flow and even there, open source software like Moodle and the next generation of LMS can almost solve that problem. Indeed, the LMS as a closed, defined environment is probably in its death throes, but as an underlying manager of consistent, meaningful data, it is only just coming of age. We are moving towards a learning organization based as much on informal exchange and personal interest as upon formal programs of learning or knowledge gathering.

In the past, I have defined a learning organization as one where all members of the extended community (including pay rolled staff, freelancers, consultants, associates and suppliers) sees themselves as teachers, learners and sources of business knowledge. In the new model sketched out above, these three facets will be almost indistinguishable. The sharing of knowledge will be both a teaching and a learning process, and business knowledge will flow almost imperceptibly around the wider community as the individual communicates with colleagues and customers. Indeed, for a business to call itself a "learning organization", it needs to enact these processes almost instinctively as part of its culture – "the way we do things around here" – and it is only cultural change that will embed these processes and deliver the returns.

Clearly, responsibility for all this cannot lie exclusively in the domain of the learning professional, who should be boundary spanning but have a realistic job as well. There does, however, have to be some expansion of the learning professional's role to include the following: providing strategic advice to senior executives on talent issues and acting as liaison if not person responsible for whole life cycle talent development – stretching from recruitment through induction and including performance management, career development and, finally, exit strategies. Knowledge management roles must also be integrated into the culture change process and learning professionals need to be part of the team that defines the electronic workspace. This process must also affect the leadership pipeline, succession planning and the celebration/documentation of hotspots of innovation and good practice.

This redefined learning role is light years away from being fully realized! It requires a team of negotiators, facilitators and learning experts to be as comfortable building online environments as they are mapping out face-to-face delivery. They will need to be able to coach others to communicate and share knowledge, supporting leaders throughout the organization.

The conundrum at the heart of this shift is that the role and impact becomes so great and intertwined with the whole business strategy that the learning professional and team will no longer own learning. Ownership has to transfer to the business. For example, Charles Jennings, who used to work at Thomson Reuters as Global Learning Leader, devolved his budget and staff to the operational divisions so he could focus on innovation and strategic direction. He left himself a small development budget to trial innovations and ideas in advance of corporate roll-outs. This freed him up to embed learning within the executive team and increase the velocity of learning across the whole organization.

For learning to be integrated into organizational culture, it has to be bursting out everywhere and, in an almost organic way, evolve and respond to needs. This means it is delivery platform agnostic and at the heart of the digital workspace. The learning leader has to create the climate and provide the correct ingredients so that he or she can then watch in amazement as it evolves and develops outside his or her direct control.

As more and more organizations begin that process, we will begin to see radical approaches to learning emerge over the next 12 months, which will establish a pattern for the next few years. Learning leaders will be having the time of their lives at the heart of what makes an organization tick, delivering real business value in an environment where staff will feel stretched, challenged and valued. The reward will be a culture of innovation and improvement that will finally draw upon the talent and intelligence of the many rather than the few. It is a prize worth aiming for!

Nigel Paine, a MASIE Learning Fellow since 2006, speaks at conferences around the world, writes for a range of international publications and coaches senior executives in companies in Europe, Australia and the USA. He is currently Managing Director, nigelpaine.com ltd., a company that focuses on promoting creativity, innovation and learning and the link between them. Prior to starting this company, he led the BBC's Learning and Development operation from 2002 to 2006 where he built one of the most successful learning and development operations in the UK. This included an award winning Leadership program, state of the art informal learning and knowledge sharing and one of the most successful and well-used intranets in the Corporate sector.

K-12, Higher Ed & Corporate Learning – We Are Not That Different!

By Elliott Masie, The MASIE Center

Sit next to me on a plane and ask what I do for a living. I'll say that I am in the learning field. You will immediately try to guess if I am a college professor, a high school principal, a 3rd grade teacher or perhaps a corporate CLO. Sure, we might each look a bit different, have significantly divergent salaries and dissimilar daily work styles. K-12, Higher Education and Corporate Learning are unique worlds, desperately needing to connect and learn – with and from each other.

On the ground, what we each do is quite different. A 3rd grade teacher may spend 6 hours a day, 5 days a week, 45 weeks a year with the same 24 students. A college professor may spend 3 hours a week in a classroom or an online webinar with a group as small as 5 or as large as 800, followed by office hours, assignments, final papers, exams and the assignment of grades. And, a corporate trainer may lead a 3-hour onboarding session or an intensive 12-hour-a-day leadership retreat that lasts 5 days.

Yet, zoom out to the 3,000 foot high level and we are each facing similar issues, challenges, opportunities, changes and research questions:

- **Learning Technologies:** How will we design learning using emerging technologies, including mobile, tablets and simulation systems?
- **Collaborative & Social Learning:** How will we leverage the power of collaborative learning activities to support mastery and performance?
- **Learning Styles:** What types of learning work best for which topics and for specific types of learners?
- **Shifts:** How are learners changing and evolving in their expectations and preferences for content, context and engagement?
- **Measurement & Outcomes:** How do we most effectively measure learning, teaching, transfer and impact?
- **Skill Bridges:** How can employers articulate highly specific skill requirements so that colleges and high schools can target their programs effectively?
- **Learning Systems:** How do we apply what higher education is learning about learning systems to corporate learning systems? How do we experiment with using open source and non-learning-specific systems to support educational and talent efforts?
- **Research Collaboration:** Can we take research on specific learning approaches from one sector and apply them as starting points for practice in another sector? And, what about a shared agenda for needed research on cognitive science and performance support?

A good example of our similarities can be found in a topic that has become a big buzz phrase in the last two years: social learning. While talking about social learning in corporate settings is somewhat new, our colleagues in elementary schools have been working on and researching this topic for decades.

Two colleagues of mine, David and Roger Johnson from the University of Minnesota, have conducted over 30 years of research on the effectiveness of specific teaching. Their work, and that of others in the field, points to high-impact ways in which content can be designed for collaborative/social learning, with documented spikes in mastery and understanding. For example, there is a classroom technique called "jig-sawing" that segments a knowledge topic into smaller sets. Groups of 3 students master each set and then teach them to the remainder of the group. Research shows that this enhances cognitive mastery and lowers the need for teacher remediation.

But, the literature on social learning in the corporate field almost always ignores the research from elementary schools and poses social learning as a child of Internet innovation. I believe that many who are promoting "new" models, such as social or collaborative learning, or even mobile learning, do not want to give credit to sources outside of the "innovation bubble" for these inventions.

We must stop this silliness and build bridges among higher education, K-12 and corporate learning. If we are truly learning "professionals", we must scan every related field for knowledge, practice and applicability – even if it is not labeled corporate learning. We must look at research, practices and even tools that have been born outside of corporate learning that might have a huge implication for innovation in our world. For example, we have been experimenting with using open source tools that are primarily K-12 and Higher Ed based that can be easily adapted - without cost or consultants - for the workforce learning field.

The Learning CONSORTIUM has begun dialogues with leaders from Educause (higher education CIOs) and Achieve.Org (school-based standards) to find ways in which we can broaden the research and practice perspectives for the wide, wide world of learning. We expect that we can find ways in which shared research on the best pedagogical and technological approaches can come from dialogues across our worlds. And, investments in learning systems and technologies might be able to be leveraged more easily across a wider spectrum of markets if we recognize and promote the linkages from K-12 to Higher Ed to Workplace.

Lifelong learning is not just a phrase. There are practices, innovations and methods that will span our lifetimes of learning. And, there are organizational strategies and approaches that can be well informed by our colleagues in the other sectors of education. I wish that every college professor and high school teacher had the opportunity to spend time in a corporate learning department. And, I wish that we had increased roles for corporate learning professionals on school boards and in the classrooms of our schools.

The most unique thing about the human species is our ability to learn – at every stage, turn and moment of our lives!

Elliott Masie is the CEO of The MASIE Center and host of Learning 2011.

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Elliott Masie is the Host of Learning2011 and the Chair of The Learning CONSORTIUM, a coalition of 240 Fortune 500 global organizations cooperating on the evolution of learning strategies, including Allstate, Google, Sears, Bank of America and Hewlett Packard. As an internationally recognized futurist, analyst, researcher and organizer on the critical topics of learning, technology, leadership and workplace productivity, he heads The MASIE Center, a Saratoga Springs, NY think tank focused on how organizations can support learning and knowledge within the workforce. He is the editor of Learning TRENDS by Elliott Masie, an Internet newsletter read by over 55,000 business executives worldwide, and is a regular columnist in professional publications.

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