Partner With Power Users to Support Continuous Learning

A modern learning approach entails developing in-the-moment training.

BY ENID CRYSTAL AND CLEON MCCLURE

Most learning professionals would agree that one-and-done training is not effective if the goal is to produce meaningful performance improvement. A modern learning approach enables workers to access materials when they need them, while they are performing their tasks. However, when faced with limited time, resources, and budget, shifting toward a continuous learning approach may seem like an impossible undertaking.

With no additional resources, an extremely short time frame, and a little ingenuity, our team of two learning professionals successfully transformed learning from the traditional approach to modern, in-the-flow-of-work learning for a medical technology company.

The project began when we received a call from a senior business leader that went something like this: "We are two months away from implementing a global, enterprise-wide system that is mission critical for our group in regulatory affairs. We need you to create training to support the significant process changes, global collaboration requirements, and technical rollout of the system and organizational changes for business effectiveness and improvements. You won't receive any additional resources or budget."

It would have been easy to follow a traditional approach and quickly create training modules and assign them to employees via the learning management system. However, we knew that approach would not yield desired results.

We wanted to find a way to offer an experience that provided employees with learning and application opportunities from the time they completed an initial business step in the system to finding and applying advanced business and system information for more complex processing activities. It was critical for staff to stay current with startup changes. If we had simply created learning modules and assigned them via the LMS, employees would review them once and soon forget what they learned. We sought to support continuous learning using just our existing tools and limited resources.

A custom blended learning strategy was the best approach. We organized it into complementary learning elements: virtual instructor-led training, on-demand resources, and LMS-delivered training. Since the initiative was a big change for the organization, we needed to paint a picture for executives and other stakeholders to show how the new approach would work. We communicated the blended strategy via a Venn diagram with detailed development and design activities to show how the approach combined instructional methods to focus on learner knowledge and performance improvement.

With our strategy in place, we next determined what content to create for which roles. To establish learners' specific needs, we relied on experienced power users who worked in the business and understood the system. They were fundamental to helping us tailor how they used the business process steps, roles, and system in their lines of business as well as in identifying what training specific job roles needed.

Learner Benefits
Associates have commented about how helpful it is for them to have needed, easy-to-access resources at their fingertips while in the flow of work.

Organization Gains
The business appreciates the efficient and cost-effective development process that targets performance as well as L&D's use of tools it already had and with which learners were already familiar.

L&D Wins
Working alongside power users ensures accurate workflow steps and processes as well as the ability to reach appropriate learners at the right moment.

We developed a role matrix, which is a straightforward, home-grown method that consists of a spreadsheet showing the system tasks and processes down the left side with each task in a row. Each role in the business process or system had its own column.

We prepopulated the matrix with detailed process and system requirements from our technical team. The power users identified the tasks that each role performed by marking an X in the task cell. By looking at the role matrix, it was clear who needed training on which tasks.

That enabled us to decide whether to create e-learning modules, ebooks, or microlearning modules for the tasks. The role matrix became our blueprint and ensured that we provided the right training to the right people. It also provided the technical team with a detailed road map to grant access to the system.

To optimize our limited resources, we streamlined creation of learning materials. Initially, we recorded instructor-led training sessions and scripted demos, collaborating closely with power users to ensure the content would be useful. Instead of the typical "click here" demos that walk through all the possible permutations of every system feature, we focused on real business scenarios—with the ideal path that showcased the most straightforward steps for successful end-to-end processes for a role.

With the raw materials in hand, we could produce learning assets. Using an e-learning course builder platform already in our learning ecosystem, we edited videos into microlearning. Each stand-alone asset covered the process and system steps to complete a single business scenario.

In addition, we created searchable ebooks featuring detailed steps with corresponding how-to recordings reused from the power users' sessions. The ebooks became extremely popular and enabled people to search within or download the resources locally.

Because the company uses Microsoft Teams, we housed the microlearning modules and ebooks as a resource library on a Teams site that functioned like a website. That made the learning assets available to employees on demand. The application's functionality has the benefit of collaboration as well; people could pose questions and get answers from peers, including power users.

We reserved the LMS for compliance policies and procedures tracking. To meet comprehensive learning requirements, we assigned full "read-and-understand" documents to the correct audiences via the LMS. System licenses and access were based on associates' successful completion of the policies and procedures applicable to their roles. Doing so assured that no one could access the system without the minimum knowledge of the correct policies and procedures. In the event of a compliance audit, we could prove completed training through LMS tracking data.

Finally, creating standard master course templates for e-learning modules enabled us to develop them faster. The content would differ by business process or system, but the lessons' structure was consistent over the modules. The templates not only saved us development time, but the associates liked it because they became familiar with the course flow and understood their chosen path. Each module's lessons were based on a specific process or workflow, including why the process was important, what it was, how to perform it, and which role performed it.

With power user input, design for reusability, and simple business scenario content, we produced a host of learning assets: 60 modules, 300 ebooks, and a variety of microlearning and reference materials.

One of the biggest challenges we had in shifting to a modern learning approach was educating stakeholders on its benefits over traditional, old-school learning. Doing so paved the way for a new culture of continuous learning.

The fact that we didn't need to invest in new tools or introduce a new technology system was a big plus. Using a platform that employees were already using eliminated friction in accessing the learning resources library.

We cannot overstate the importance of a community of power users. Those individuals were instrumental in identifying which learning assets to create and became advocates for the new approach to learning. We provided an easy-to-use structure to design and develop learning that power users readily adopted and promoted.

Enid Crystal is a learning design consultant; enid.crystal@gmail.com.

Cleon McClure is a learning and performance improvement professional; cleon.mcclure@gmail.com.

td
talent development

SUBSCRIBE TODAY!

Interested in subscribing to *TD* magazine?

Rates

$180 Individual Domestic (US)

$331 Institutional Domestic (US)

$279 Individual International

$430 Institutional International

To subscribe, go to td.org/TDsub.

Get even more when you become an ATD member!

All ATD memberships include a monthly subscription* to *TD* magazine, plus access to webinars, digital publications, research, discounts on conferences, and much more.

For details about ATD membership, visit td.org/membership.

*International members outside the US, Canada, and Puerto Rico receive the digital *TD* magazine as part of their membership.

atd Association for Talent Development