



**TD: Talent Development**

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**Vol. 74 Issue 6 - 2020**

- **A Sign of the Times.**

By: St. Gerard, Vanessa. , p4-4. 1p. 1 Color Photograph.

According to the Association for Talent Development's 2019 State of the Industry report, instructor-led, face-to-face classrooms were the setting for 54 percent of learning hours used in 2018. No...

**Subjects:** VIRTUAL classrooms; VIRTUAL reality

- **The Quintessential Accidental Trainer.**

, p6-6. 1p.

As a supervisor at a call center, Crystal Hong was called on to create job aids, design training materials, and even facilitate leadership development sessions. Drawing heavily on her communicati...

**Subjects:** TRANSFER of training; TEACHING methods; INDUSTRIAL psychology; LEARNING; WORK environment

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Also in this issue Mercer's Let's Get Real About Equality: When Women Thrive 2020 Global Report contains good news. BCG recommends informal discussions among small groups of employees about biase...

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Employees seem to have a similar attitude toward the adoption of emerging technologies such as robotics, automation, and artificial intelligence in the workplace. In fact, 57 percent of workers b...

**Subjects:** ROBOTS; ATTITUDES toward adoption; BUSINESS success

- **Train Like You Listen.**

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L&D professionals looking for onthe-go knowledge can subscribe to Endurance Learning CEO and Co-Founder Brian Washburn's free podcast, Train Like You Listen. Washburn has 17 years of experience i...

**Subjects:** INSTRUCTIONAL systems design

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By: GHOLSTON, I. SHAUN. , p12-12. 1p. 1 Color Photograph.

Also in this issue A typo-free resume with the right buzzwords, experience, and a list of hard skills - such as user experience design or project management - are key determiners in helping a job...

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**Subjects:** VIRTUAL classrooms

- **Labor Hoarding.**

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**Subjects:** LABOR; LABOR costs; EMPLOYEE retention

- **Build Engagement by Building Teams.**

p13-13. 2/9p. 1 Color Photograph.

Workers on a team are 2.3x more likely to be fully engaged than those who are not on a team. SOURCE: THE GLOBAL STUDY OF ENGAGEMENT: TECHNICAL REPORT, ADP RESEARCH INSTITUTE, 2019 PHOTO (COLOR).

**Subjects:** TEAMS; TECHNICAL reports

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By: MOORE, ALEX. , p14-14. 1p. 1 Color Photograph.

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**Subjects:** BUSINESS partnerships; TALENT development; BUSINESS planning

- **CAFE Certification Combats Workplace Ageism.**

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INNOVATIONS It may become easier for Colorado job seekers age 50 and older to identify employers where their seasoned skill sets are welcome and valued. Through Changing the Narrative, a Colorado...

**Subjects:** AGEISM; WORK environment; CERTIFICATION; EMPLOYEE retention; COMBAT

- **Pixabay.**

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COOL TOOL Many of us take great pride in the presentations, online programs, and printed materials we create for learners. At pixabay.com, you can browse through more than 1.7 million high-qualit...

**Subjects:** PRINT materials; COPYRIGHT

- **Employ a Microlearning Content Strategy in Three Steps.**

By: SALOMONSEN, SUMMER. , p16-17. 2p.

Also in this issue The workplace is in a constant state of flux. In fall 2018, I joined Grovo, a technology company in New York, as chief learning officer and received a simple yet weighty task: ...

**Subjects:** CHIEF learning officers; BEHAVIOR; ROOT cause analysis

- **What's Your Change Attitude?**

By: BARNES, B. KIM. , p18-20. 3p. 4 Color Photographs.

What's Your Change Attitude? In the past two centuries, society has advanced through a period of rapid technological and social change. However, each of the change attitudes can add value to any ...

**Subjects:** ATTITUDE change (Psychology); HUMAN beings

- **Growth and Leadership.**

By: ATKINSON, JODI. , p22-24. 3p. 1 Color Photograph.

When talent development professionals think about designing a curriculum, they need to think about the future and the problems to address. Continued program growth Following the LEAP pilot, we bu...

**Subjects:** LEADERSHIP; CAREER development; BLENDED learning; SELF-managed learning (Personnel management); TEAMS in the workplace; Vocational Rehabilitation Services; Professional and Management Development Training

- **MAKING THE SWITCH.**

By: SATTERFIELD, MELISSA GREY; MONTANO, TRACY. , p26-31. 6p. 1 Color Photograph, 3 Charts.

Beware of creating a webinar when converting an instructor-led training (ILT) program to the virtual classroom. Central to the conversion process is a course audit - a method that ensures the res...

**Subjects:** VIRTUAL classrooms

- **THE AR EXPERIENCE.**

By: DANNEWITZ, BETTY. , p32-37. 6p. 2 Color Photographs.

AR at its simplest AR is different than virtual reality in that people experience the latter while wearing a special headset that completely immerses them in a virtual environment. I displayed th...

**Subjects:** BLENDED learning; ORGANIZATIONAL learning; WEB-based user interfaces

- **The Path Forward Amid COVID-19.**

By: TAM, GLORIA. , p38-43. 6p. 1 Color Photograph.

During the past few months, COVID-19 has transformed our lives in ways many never had thought possible. • Medical companies, such as Abbott Lab in the US and the South Korea biotech firm Seegene,...

**Subjects:** COVID-19; SOCIAL distancing; ORGANIZATIONAL resilience; MEDICAL masks; BUSINESS planning

- **Cut the Fat.**

By: PANGARKAR, AJAY M.; KIRKWOOD, TERESA. , p44-49. 6p. 2 Diagrams.

To ensure lean learning demonstrates strategic and operational value, it is essential to discover learning opportunities within lean environments and apply lean thinking to learning initiatives. ...

**Subjects:** ORGANIZATIONAL learning; CONCEPT learning

- **GO MICRO.**

By: COLLINS, BOB. , p50-55. 6p. 1 Color Photograph, 1 Black and White Photograph.

Microcredentials are a competency-based and skill-focused form of credential that demonstrates skills, knowledge, and experience in a given subject area or capability. Microcredentials are more f...

**Subjects:** MASSIVE open online courses



- **SIMULATION as a Lever for CHANGE.**

By: KOLB, GRETCHEN. , p56-61. 6p. 2 Color Photographs.

A YOUNG MAN WITH OPIOID USE DISORDER checks himself into a local hospital-based crisis response center for treatment. Four months prior to opening, interprofessional and interdisciplinary provide...

**Subjects:** KOLB'S Experiential Learning theory; MEDICAL care; HEALTH facilities; EBOLA virus disease; OPIOID abuse; All Other Outpatient Care Centers

- **Tech Poised to Transform Workplace Culture and Training.**

By: THOMPSON, DERRICK. , p62-63. 2p.

From the front line to the C-suite, most - if not all - of the workforce will require training to acclimate to the new way the world works, with special attention paid to remote work life. Spear ...

**Subjects:** WORK environment; CULTURE; TELECOMMUTING; INTERACTIVE learning

- **Use Feedback to Your Advantage.**

By: HADDAWAY, AMANDA. , p64-66. 3p.

Both the employee and the manager complete an assessment. The employee's manager, peers, and direct reports offer feedback to give a complete picture of the employee's performance.

**Subjects:** CAREER development; LISTENING skills; Professional and Management Development Training; Vocational Rehabilitation Services

- **Helping advance employee careers.**

By: Herba, Agnes. , p67-67. 1p.

OpenSesame is the elearning solution The Guthrie Clinic relies on to efficiently and effectively extend training to its large, distributed workforce. Targeted training approach When Jeff Grenzer ...

**Subjects:** EMPLOYEES; CAREER development; Vocational Rehabilitation Services; Professional and Management Development Training

- **Evergreen Talent: A Guide to Hiring and Cultivating a Sustainable Workforce.**

By: SWIGART, PEGGY. , p68-68. 1p. 1 Color Photograph.

Grow Green In Evergreen Talent, Matuson provides a bounty of ideas to grow work teams. Supervisors, not HR, should build their own teams - recruiting applicants, selecting new hires, and developi...

**Subjects:** LABOR supply; ABILITY; CAREER development; VETERANS; TEAMS in the workplace; Vocational Rehabilitation Services; Professional and Management Development Training; Temporary Help Services; Administration of Veterans' Affairs

- **Dandelion Wine.**

By: Collins, Bob. , p69-69. 1/5p.

Bradbury's stories are timeless, surprising, and on rare occasions frightening, but each contains a kernel of underlying truth that he wants to share. This is a story about the marvelous summer o...

**Subjects:** DANDELIONS; WINES; Wineries; Alcoholic beverage merchant wholesalers; Beer, Wine, and Liquor Stores

- **The Art of Work.**

By: Dannewitz, Betty. , p69-69. 1/8p.

This was a game changer for me. Goins explains that sometimes your calling and your occupation are not the same - and that is OK. When I was lost about what to do next with my career, this book s...

**Subjects:** CONCEPT learning

- **Restoring the Soul of Business: Staying Human in the Age of Data.**

By: SWIGART, PEGGY. , p69-69. 2/7p.

Rishad Tobaccowala Harper Collins Leadership, 256 pp., \$24.99 Many leaders have adopted the belief that data should be the center of all decisions. Machines, robots, and algorithms cannot replica...

- **Lead from the Future: How to Turn Visionary Thinking into Breakthrough Growth.**

By: SWIGART, PEGGY. , p69-69. 2/9p.

Mark W. Johnson and Josh Suskewicz Harvard Business Review Press, 224 pp., \$30 There is a big difference between leading to the future and leading from the future. In this book, Johnson and Suske...

**Subjects:** FRUIT harvesting; BUSINESS planning; Crop Harvesting, Primarily by Machine; Other Food Crops Grown Under Cover; Support activities for crop production

- **Leading from Purpose: Clarity and the Confidence to Act When It Matters Most.**

By: Tam, Gloria. , p69-69. 1/4p.

By Nick Craig Craig shares his perspectives on one of the most important lead principles for today's complex, volatile, and dynamic business environment: purpose-driven leadership. Based on more ...

**Subjects:** CONFIDENCE; EXECUTIVE coaching

- **Tap Into Emotion to Meet Learning Objectives.**

By: BOWER, CAROLE. , p70-71. 2p.

Emotion greatly affects learning, memory, and performance; savvy learning experience designers tap into that. By understanding the role of emotion in learning - and helping your learners form an ...

**Subjects:** EMOTIONS; PSYCHOLOGY; AFFECTIVE neuroscience

- **5 Ways to Get Buy-In for AI in HR.**

p72-72. 1p. 1 Color Photograph.

Determine how your organization will use AI - something tangible that employees and leaders can understand and get behind. You want a vendor that will be a partner rather than a company that sell...

**Subjects:** ARTIFICIAL intelligence



PHOTO | BEY BELLO

# A Sign of the Times

**W**hen we started planning this month's issue in January, little did we know how pertinent the cover story's topic would eventually become. Back then, an article detailing a step-by-step process for converting face-to-face training to virtual training sounded like a great nice-to-know resource for our readers, something that talent development professionals could keep handy until the appropriate time. Fast-forward a couple months, and it's crystal clear why such a process has upgraded to need-to-know status.

According to the Association for Talent Development's 2019 *State of the Industry* report, instructor-led, face-to-face classrooms were the setting for 54 percent of learning hours used in 2018. In comparison, virtual classrooms (live and synchronous) constituted only 11 percent of learning hours used.

Now with business travel halted, many workplaces left empty, and in-person training put on hold for the foreseeable future, virtual training has become a high-priority item. And as authors Melissa Grey Satterfield and Tracy Montano explain in their article, what you want to avoid when creating virtual training is an "extremely presentation-heavy and unengaging" end product "that looks more like a webinar than a virtual classroom course."

The authors' strategy is to complete an audit of the instructor-led program to ensure that your conversion covers all the course objectives while also keeping learners engaged with activities suited for the virtual environment. The audit will help confirm that the "result of a conversion is an effective virtual classroom course," they write.

I'm curious how severe the shift will be in the *State of the Industry* data regarding organizations' use of virtual training in 2020 compared with face-to-face training. Also interesting will be whether virtual classrooms will remain a highly used delivery mode for the long term as opposed to a short-term solution to get companies through today's reality.

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### Favorite Quote

"In a crowd, there's always one." —Unknown

# The Quintessential Accidental Trainer

As a supervisor at a call center, Crystal Hong was called on to create job aids, design training materials, and even facilitate leadership development sessions. That's when her career shifted. Drawing heavily on her communications and marketing background, Hong became primarily responsible for L&D at all subsequent employers. Today, this former theater kid finds creative release in designing and facilitating engaging training experiences for employees as YRC Freight's operations training specialist.

## What do you believe are the key factors to designing a successful training program?

Always center on the participant. Consult with subject matter experts who are your target participants or who have been your target participants in past roles. Take your consultation a step further by immersing yourself in their environment to better understand the factors that will impact training transfer, as well as the factors that might impact the learning process if you are using an instructional method like on-the-job training.

I strive to form collaborative, in-their-world relationships with my target participants—especially as an L&D professional in industries like manufacturing and transportation, where the divide between my working environment and theirs is obvious. Challenge yourself to think outside the box when creating mental models and learning activities for your content, remembering that adult learners are anything but one size fits all.

## What tips do you have for reinforcing training after the sessions have concluded?

My biggest tip is to continuously cultivate an experiential, supportive learning environment that comes to the participants. I suggest regularly pushing consumable resources to participants like articles, exercises, and videos. I also suggest scheduling follow-up conversations to discuss how participants have transferred the training to their jobs, what else they need or want to learn, and so forth. I think it is an L&D professional's responsibility to intentionally maintain relationships with participants after the prescribed time together.

## What advice do you wish you were given when you entered the L&D profession?

I wish I knew that a career in L&D was even an option for me and that such a career would greatly benefit from and blossom out of fields like communication studies and journalism instead of solely orbiting HR. The knowledge, skills, and abilities typically attributed to communications and marketing are also key to L&D. The advice I wish I were given—and that I give to those I now mentor—is simply there are many paths up the mountain and that the mountain is yours and no one else's to map and conquer according to your definition of fulfillment, happiness, life, and love.



# A Long Road Ahead for D&I

While organizations are making progress, equality for people of color is still lacking.

BY PATTY GAUL

**M**ercer's *Let's Get Real About Equality: When Women Thrive 2020 Global Report* contains good news. Consider, for example, that 81 percent of responding companies said improving diversity and inclusion is high on their agendas. And 66 percent indicated their senior executives are involved in D&I. Finally, 72 percent of businesses are conducting pay-equity analyses.

However, D&I is hardly an open-and-shut case. And that is pronounced when it comes to race and ethnicity, especially women of color. As the report states, "The most dramatic decrease in representation is among Black/African American employees who make up 12% of support staff positions, but only 2% of executive level positions." This is an area ripe for opportunity. But it's going to take more than organizations saying they are committed to racial and ethnic equality.

Here are some stark statistics: A mere 13 percent of respondents said they have programs specifically targeted for women of color, just 23 percent of companies said they review their performance ratings by race or ethnicity to check for any negative effects, and the same percentage of organizations relayed that they have high-potential programs for people of color.

In introducing the report, Mercer President and CEO Martine Ferland emphasizes that "Policies, processes and programs need to be aligned and connected to eliminate bias—especially the unconscious bias that leads people to hire and

develop people who look, talk and think like they themselves do."

The research was conducted in conjunction with EDGE Certified Foundation from September through November 2019. It covered 54 countries and 1,157 organizations, considering topics such as engagement, accountability, and leadership; pay equity; financial well-being, health, and caregiving; and talent practices and career development.

Boston Consulting Group says that while business leaders now understand the importance of D&I, many underestimate the challenges. In the article "Fixing the Flawed Approach to Diversity," Matt Krentz and co-authors write, "They launch programs that they *think* will yield improvements, but their decisions are based on gut instinct rather than proven results. Unless they acknowledge their blind spots, these leaders won't make meaningful progress."

BCG recommends informal discussions among small groups of employees about biases and cultural issues, implementation of clear criteria about employee evaluations and promotion decisions, formal sponsorship for individuals of color, and individual road maps for advancement. It's critical, the consulting company continues, to include and gain buy-in from frontline leaders—an employee's day-to-day experience is where the rubber meets the road.

**Patty Gaul** is a senior writer/editor for ATD; [pgaul@td.org](mailto:pgaul@td.org).



BONUS  
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CONTENT



## NOW YOU KNOW

# Robots: Friend and Foe

Workers' opinions about the impact of robotics and automation on their jobs are mixed.

BY JACK HARLOW

**H**umans have a unique ability to hold two seemingly clashing opinions about certain topics at the same time. For example, we like and eat junk food but know it can be unhealthy for us. Employees seem to have a similar attitude toward the adoption of emerging technologies such as robotics, automation, and artificial intelligence in the workplace.

According to MindEdge and Skye Learning's third annual Future of Work Study, *Preparing for Robot Colleagues: A New Decade of Robomageddon*, 76 percent of employees surveyed feel that advanced technologies make their work easier—but 55 percent don't agree with the claim that robots are better at doing that work than they are. In fact, 57 percent of workers believe that "robots and automation are bad for American workers."

Still, just one-quarter of respondents said they fear advanced technology will end up stealing their jobs in 2020, and slightly more than that (29 percent) are worried that it may happen in the next five years.

Benefits that workers stated about robotics and automation include the positive impact both have had on office morale and how they can save employees' time, enabling them to pursue more interesting work. But they also think that technology has already taken over part of their jobs, and they are mixed on whether these technologies will create more jobs than it displaces.

Those inconsistent views are explainable and present an opportunity for talent development professionals. As Chad Udell and Gary Woodill write in their 2019 book *Shock of the New*, "The widespread acceptance of technological realities is bound to give a bit of an identity crisis to those who have been able to chart their own paths and create protected spaces inside their businesses."

To ensure the continued well-being and engagement of their workforce, organizations need to grapple with the feelings workers may have toward the advanced technologies that are increasingly viewed as essential to business success. That may suggest a greater importance of change management programs in organizations considering introducing advanced technology. What steps are you taking to communicate the effect these technologies will have on workers and their future?

**Jack Harlow** is a senior developmental editor for ATD; jharlow@td.org.



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## OFF THE WIRE

# Train Like You Listen

L&D professionals looking for on-the-go knowledge can subscribe to Endurance Learning CEO and Co-Founder Brian Washburn's free podcast, *Train Like You Listen*. Washburn has 17 years of experience in instructional design as well as training and development, and each week, podcast listeners can eavesdrop on his insightful conversations with subject matter experts as they discuss L&D-related topics.

Subjects covered on the podcast have ranged from applying lean principles to onboarding and webinar design best practices to experimenting with new technologies and learning ecosystems. Some of the guests previously featured on the show include Melissa Milloway, learning design experience manager at Amazon; JD Dillon, chief learning architect at Axonify; and Kassy LaBorie, principal consultant at Kassy LaBorie Consulting.

Understanding that the path to success for L&D professionals is paved with continuous learning, Washburn's podcast is a great resource for those who keep busy schedules. With each episode running approximately 10 minutes, the busy L&D professional will appreciate the podcast's brevity. Its short, to-the-point format coupled with quality information makes bingeing on all previously recorded episodes a realistic and worthwhile goal. Catch the latest episode of the *Train Like You Listen* podcast every week on iTunes, Spotify, and at [trainlikeachampion.blog](http://trainlikeachampion.blog).

## IN PRACTICE



# Make Online Connections

Talent development professionals can tap into the value of online communities.

BY PATTY GAUL

**T**alent development practitioners increasingly make note of what they can learn from the marketing field—such as creating learner personas and frequently collecting data, as Danielle Wallace suggests in the *TD* article “Steal Marketing Practices for Better Learning Programs.” Although targeted for the marketing industry, a recent Reddit and Global-WebIndex report *The Era of We: and the Rise of Online Communities* offers valuable guidance that talent development professionals can take regarding connecting with their intended audience.

The report discusses how individuals are using social media and online communities—preferring the latter—and what they’re gaining from the

digital world. “When asked why they visited online community sites,” the authors explain, “the second-most popular answer among users in the US was to connect with people who have similar interests.” The most popular answer: discovering new things.

In contrast to social media, online communities feel safe, the report states. As much as talent development practitioners talk about the need for a safe learning space and work environment, consider these respondent findings: 36 percent more online community users than social media users said they

**19%**

of online community visitors felt their voice was heard compared to social media users.



could have meaningful conversations, and 28 percent more of those online community users said they are respected by others. Beyond providing a place to be heard, online communities are a space to be authentic.

What can this mean for talent development and the organizations and employees they serve? As Carrie Addington writes in the *TD* article “The Retail Potential of L&D,” “replace target consumers with learners.” Similarly, insert learners in the Reddit-GlobalWebIndex report’s assertion that “Ultimately, consumers value knowledge and opinions

from people they know in real life, or people they have a genuine connection with above all else.”

Given what online communities do, how can talent development professionals use them to their advantage? Design learning experiences that bring people together in online communities to share—spaces that enable learners to have meaningful conversations and share authentically—a safe place to ask, offer best practices, and exchange ideas.

**Patty Gaul** is a senior writer/editor for ATD; pgaul@td.org.

## INFOGRAPH

# Ripe for Burnout

Here are key predictors that staff will get burned out:

Lack of recognition  
for hard work or  
accomplishment

**78%**



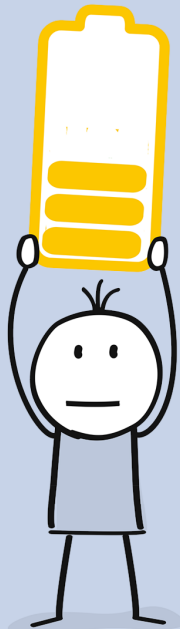
Recent changes  
that affect them

**72%**



Micromanaging boss

**45%**



Corporate politics

**40%**

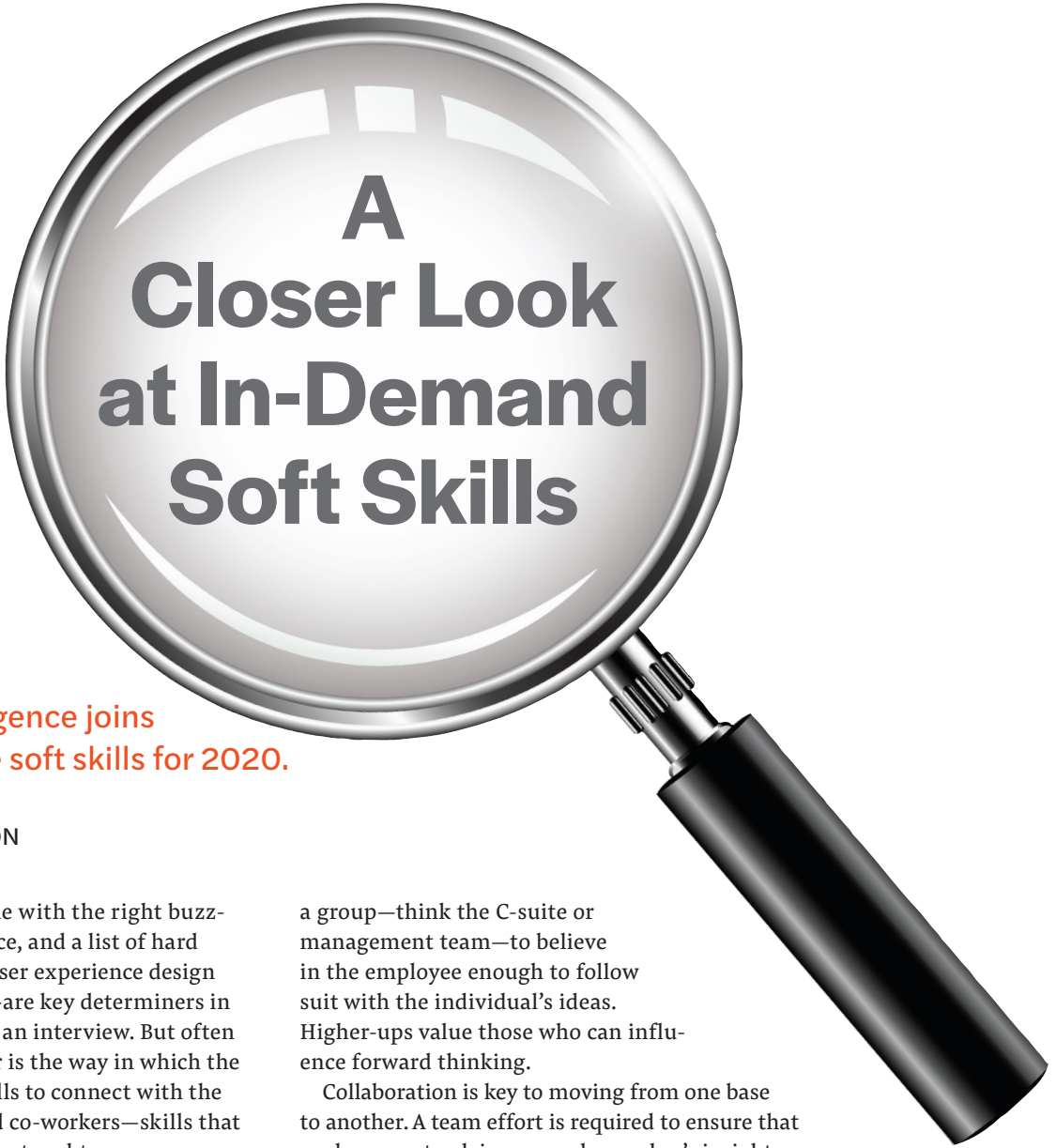


Devices or  
applications  
break often

**33%**



SOURCE: GLOBAL BUSINESS TECHNOGRAPHICS WORKFORCE BENCHMARK SURVEY, FORRESTER ANALYTICS, 2019



# A Closer Look at In-Demand Soft Skills

Emotional intelligence joins the list of top five soft skills for 2020.

BY I. SHAUN GHOLSTON

A typo-free resume with the right buzzwords, experience, and a list of hard skills—such as user experience design or project management—are key determiners in helping a job seeker land an interview. But often what solidifies a job offer is the way in which the interviewee uses soft skills to connect with the prospective manager and co-workers—skills that are typically innate and untaught.

In LinkedIn Learning's *2020 Workplace Learning Report*, four of the top five soft skills—creativity, persuasion, collaboration, and adaptability—maintain their rankings from 2019, speaking to their essentialness in the workplace. New to the top five for 2020 is emotional intelligence, replacing time management. Accordingly, talent development professionals may find themselves creating more EQ-focused content as that soft skill becomes more desirable in the workplace.

Here is a breakdown of the top five skills and the reasons they're valued:

Creative people bring new perspectives to companies and push off-the-beaten-path ideas, which can help companies flourish. Persuasion is an effective soft skill that requires the majority of

a group—think the C-suite or management team—to believe in the employee enough to follow suit with the individual's ideas. Higher-ups value those who can influence forward thinking.

Collaboration is key to moving from one base to another. A team effort is required to ensure that goals are met, relying on each member's insights and capabilities and not just those of one person.

Adaptability requires the ability to switch gears when change happens and to keep moving without too many missteps. The world's abrupt shift to working remotely as a result of COVID-19 is a prime example of being adaptable in the way we work.

Emotional intelligence is the ability to relate to others empathetically, control one's emotions, and be self-aware, among other elements. Those five soft skills are necessary when collaborating with colleagues, whether for a team project or orchestrating an after-work team social.

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CEOs spend

**20%**

more time learning soft skills than the average learner.



BONUS  
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CONTENT

# Know How to Break the Ice

Priming learners requires careful consideration.

It's critical to start off a training event—whether classroom or virtual—the right way: setting the stage for learners to be comfortable and ready to learn. That's why becoming adept with icebreakers—activities, games, or events that welcome participants to the training session or meeting—is so important for facilitators. In “Icebreakers: Be Strategic,” Nikki O’Keeffe and Patty Gaul update Robert Preziosi’s *Infoline* issue and provide key factors for you to consider with icebreakers.

Being familiar with the audience gives you insight into the type of icebreaker that is appropriate. Do classroom participants work together, or is the training session the first time everyone will have met? Does an icebreaker that enables participants to introduce themselves to others make sense, or do you want one that will build a deeper level of rapport

among teammates? What role do learners fill? Are they senior leaders or IT professionals, for example? How will they react to your icebreaker?

You can also modify many icebreakers for virtual training sessions. For instance, participants can use virtual breakout rooms for brainstorming. Or you can use the chat function for the One Word icebreaker, in which participants answer an opening question with one word after the facilitator kicks off the exercise.

A final piece of advice: Always have a backup plan if your first icebreaker falls flat.



## MORE ONLINE

These tips were adapted from the June 2020 issue of *TD at Work*. Learn more at [td.org/TDatWork](https://td.org/TDatWork).

## WORD WIZ

# Labor Hoarding

Economists are presenting an idea that encourages companies to keep employees on the payroll and avoid layoffs during an economic downturn: labor hoarding. Arindrajit Dube, economist and professor at the University of Massachusetts Amherst, says labor hoarding is when employers faced with a downturn don't lay off workers but keep them around even though there isn't as much work. While this idea may seem counterintuitive to some, it is a strategy that can help companies avoid recruitment expenses in the long term and help sustain the greater economy.

Hiring and losing employees cost companies. Many studies show that the total cost of losing an employee can range from tens of thousands of dollars to 1.5 to two times the individual's annual salary, notes John Bersin, global industry analyst, in his LinkedIn post “Employee Retention Now a Big Issue: Why the Tide has Turned.”

In theory, companies that implement a labor hoarding strategy during an economic downturn will have less hiring to do as the economy rebounds. Accordingly, labor hoarding can help companies stave off some of the costs associated with refilling positions by retaining their existing talent.

On a larger scale, economists say that labor hoarding is a way to reduce the long-term impact of a recession and help the economy recover faster. “It's really important to labor hoard,” notes Tim Bartik, Upjohn Employment Research Institute senior economist. “Because if you don't, workers lose a paycheck and cut back spending, creating more demand shortfall.”

## FAST FACT

# Build Engagement by Building Teams

Workers on a team are

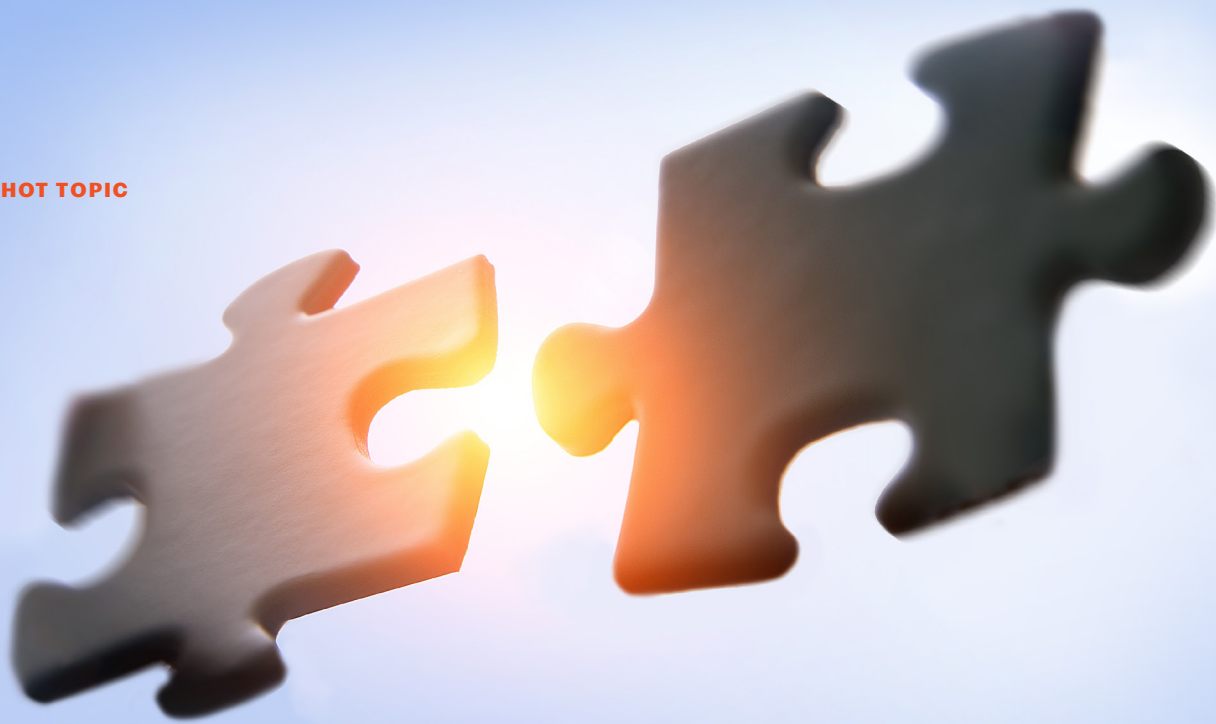
**2.3x**

more likely to be fully engaged than those who are not on a team.



SOURCE: THE GLOBAL STUDY OF ENGAGEMENT: TECHNICAL REPORT, ADP RESEARCH INSTITUTE, 2019

HOT TOPIC



# Strategic Alignment Is Linked to Better Business Outcomes

What does it take to get there?

BY ALEX MOORE

**L**eaders in talent development have understood the value of working in strategic alignment with the rest of their organizations, but now they can quantify it. The Predictive Index's 2020 report *The State of Talent Optimization*, a study of 600 executives, demonstrates a strong connection between having aligned talent and business strategies and company performance.

The report reveals that highly aligned organizations had an average strategic success rate of 89 percent, compared to 73 percent for all organizations. Highly aligned organizations had lower turnover rates for top-performing employees, higher employee performance overall, and higher Glassdoor ratings than other companies. Further, executives at highly aligned organizations spent less of their time solving people problems.

So, what can talent development leaders do to achieve better alignment and help their companies realize these benefits? One useful practice is cultivating business leaders who vocalize their support for talent development. The recent Association for Talent Development research report *Strategic Alignment: Orchestrating Organizational Success* found that with business leaders who vocalized their support for talent development to a high or very high extent, doing so had a positive, statistically significant connection to being highly aligned. Companies where talent development leaders and data influenced business strategy to a high or very high extent were also significantly more likely to be highly aligned.

To cultivate other leaders' support and influence to drive alignment, the talent development function should demonstrate its credibility as a business partner

for the organization. Kimberly Currier, senior director for talent development for Americas at AECOM, says the key is "to communicate as a business function with a business-minded approach to what you do."

In an interview for the ATD report, she explains that communicating in this way requires you to "know how the business makes money and what it needs to do to achieve its financial goals." For example, to Currier that requires "understanding where our profit and losses come from, the general nature of the projects we get, and the human capital we need to excel on those projects," along with other industry-specific information.

**Alex Moore** is a junior research analyst for ATD; [amoore@td.org](mailto:amoore@td.org).



BONUS APP  
CONTENT

## INNOVATIONS

# CAFE Certification Combats Workplace Ageism

It may become easier for Colorado job seekers age 50 and older to identify employers where their seasoned skill sets are welcome and valued. Through Changing the Narrative, a Colorado-based initiative designed to prevent workplace ageism, businesses and employers that meet specific requirements can earn the Certified Age-Friendly Employer (CAFE) classification.

Attaining designations such as Best Place to Work or Healthiest Place to Work is common practice for many employers—not just for bragging rights but to provide prospective workers with a glimpse inside an organization's culture. The CAFE certification is no different.

Supported by the Boston-based Age-Friendly Foundation, the CAFE classification offers a nod to employers that value employees based solely on their proficiency, qualifications, and

contributions—regardless of age—and also maintain policies, practices, and programs supporting people age 50 and older. Achieving the designation involves a confidential assessment of the company's practices in 12 categories, including candidate recruitment, employee retention, training and development, and healthcare benefits.

Creating a more age-friendly workplace also puts a demand on L&D professionals. According to Changing the Narrative, age-friendly workplaces should invest in training for people of all ages and encourage reciprocal mentoring so that younger and older individuals can learn from each other. Well-known organizations that are already age-friendly certified include AT&T, the Home Depot, Starbucks, and Walgreens. The CAFE designation debuted in Colorado in early 2020.

## COOL TOOL

# Pixabay

Many of us take great pride in the presentations, online programs, and printed materials we create for learners. While the content may be superb, some instructional designers drop the ball with aesthetics.

How do your training products look? Humans are visual creatures, and slacking on the optics of a project can be distracting to learners.

At [pixabay.com](https://pixabay.com), you can browse through more than 1.7 million high-quality, no-cost stock images and videos. The lion's share of images and videos available in the collection are royalty free—meaning you can copy, modify,

distribute, and use them, even for commercial purposes, all without asking for permission or giving credit to the artists. That is important, because typically performing online searches and right-clicking to save as a way of procuring images for projects is not advised due to copyright laws.

Pixabay's online gallery is a recommended resource for L&D professionals with tight budgets or those who may not have access to a graphic design wiz. Smart use of high-quality images can take your next project from good to great and give your content an extra pop.

A vertical graphic with a dark blue background. At the top, several circular icons in purple, pink, and blue contain the text 'IW GO', 'IW WORK', and 'IW LEAD'. Below these, the text 'Develop talent for your sustainable remote work future.' is written in white. Further down, more circular icons contain 'IW LEAD', 'IW TRAIN', 'IW WORK', and 'IW GO'. A large white 'W' logo is positioned above the text 'WORKPLACE LESS' in large, bold, white and blue letters. At the bottom, the URL 'workplaceless.com/teams' is written in white.

Develop talent for your sustainable remote work future.

**WORKPLACE LESS**

[workplaceless.com/teams](https://workplaceless.com/teams)



# Employ a Microlearning Content Strategy in Three Steps

Staying laser-focused saves time, resources, and money.

BY SUMMER SALOMONSEN

**T**he workplace is in a constant state of flux. The speed of an increasingly global and technology-driven economy has resulted in changed and changing business models and organizational structures, along with shifting priorities in the face of digital transformation.

Yet amid all those adjustments, talent development professionals are tasked with doing more with less: Build learning content to address the changes, deploy programs seamlessly without new technology, and influence and improve culture without a budget. To maintain competitive advantage, organizations require practical and actionable learning strategies that respond to those shifting workplace dynamics.

In fall 2018, I joined Grovo, a technology company in New York, as chief learning officer and received a simple yet weighty task: Clearly define and conceptualize microlearning as both a content type and strategy. The concept was rapidly becoming the latest L&D buzzword, and more often than not, its value was predicated on temporal measures such as “a two-minute video is the best length for learner absorption and attention span.” Well, not really.

Learners don’t waste seven seconds on content that is disconnected, irrelevant, or flat-out boring. But they’ll willingly hang on to minute 10 when they see value in what they’re watching.

Some TD professionals envisioned microlearning as the forcing function the industry needed—that is, a way to pare back the nonessential and prioritize the pith; a way to strip down all the noise that usually gets attached to learning programs, such as those last-minute priorities that add 10 more slides to decks, 20 more minutes to the presentation, and one more branched scenario to e-learning.

To the contrary, microlearning is a study in the power of less. And while it is not the end all, be all in a world of quickly changing technologies and fast-moving business models, microlearning can be a way to reach learners at the moment of need with just the right resources.

**Step 1: Start small.** The first step to a microlearning strategy is the trickiest, because it forces TD practitioners to reckon what we believe is most valuable with what is most critical. Many first-time learning initiatives fail because the scope is too large. Set yourself up for success by first narrowing in on a set of specific employee behaviors that will support your company’s most urgent business goals.

Preserve resources by asking the tough questions:

- What’s our recurring pain point? Cross-team collaboration? Communication breakdown? Poor management?

## Resources Used

Sell the microlearning strategy via the communications vehicles that employees, managers, and leaders use most.

## Cost Savings

No-cost marketing: Nuancing and reiterating the message will help gain buy-in to the learning initiative.

## Best Practices

Stick with familiar principles. Adhering to practices such as the 5 Whys will help determine the root cause of performance gaps.

- Why is this issue more crucial than others? Is it because our long-term goal is retaining frontline managers? Or do we need to deepen our leadership bench?
- How would the organization improve if we resolve this? (Dream big; let yourself imagine a workplace free from this challenge.)

Next, save time by deliberately determining the root cause. Conducting a root-cause analysis is critical to establishing a baseline. In practice, however, this intention often falls flat. A microlearning strategy relies on the validation of the core problem. I prefer the 5 Whys strategy, which forces me to dig deep and find the root problem.

**Step 2: Stay focused.** Now that you've identified the target behavior, you'll need to stay focused to maximize your microlearning strategy's impact. Be mindful of the "also-rans"—those similar yet different initiatives that divide your focus and weaken your initiative's impact.

Don't let last-minute asks disrupt your attention. It invariably

## SOLUTION

Implement microlearning based on a sound strategy, one that focuses—and keeps the focus—on the most pressing organizational needs.

happens that right when your new initiative is approved, you become the target of multiple, competing priorities. And while those other projects are valuable in their own way, the power of a microlearning strategy is in its ruthless prioritization.

Expand your reach by building your one-minute talk track for your program—why it's important, what problem it solves, and how everyone will benefit from its success. Then tell everyone. Put your company's communication channels to work for you. Share this talk track in whole and in part during your one-on-one meetings, in quick exchanges with stakeholders, and as a quick ending to emails.

**Step 3: Make it stick.** Architecting a strategy is one thing; successfully deploying it is another. A solid microlearning strategy should be deployed in context. That means you must surround the strategy with appropriate communication, making explicit connections to employees' work and tasking managers with appropriate follow-through tasks.

Save money by leveraging existing channels. In my consulting years, I spent significant time helping clients think through ways they might deploy a new strategy. Usually they would assume they need a new way to do this. TD professionals often overlook the backbone of their companies—those internal supports that transmit culture—as ways to reinforce TD strategies. Here are a few ideas:

- Send an email that doesn't require scrolling, with distilled bullets right up top.
- Deploy a pulse survey to gauge retention in a recently completed training.
- Crowdsource ideas through a social communication tool about a program's impact.
- Use your influence to add agenda items at all-staff meetings that reference your program.
- Enlist your frontline managers (the greatest change agents) to champion your initiative and drive relevance by making the connection to real work.

A microlearning strategy is uniquely effective in targeting behaviors and driving change in the workplace. When you start small and take the time to answer the questions relating to your most pressing business challenges, the answers you find will enable you to preserve precious resources until they are needed by focusing your efforts on what really matters. There's nothing worse than wasting your subject matter experts' time prematurely.

When you take time to drill down in your analysis and find the root cause of your organization's performance shortfall, you'll refrain from spending time architecting learning programs that

only respond to symptoms. If you are a department of one, you can ill afford to do this. Even if you're a department of 20, you can't afford it.

With few resources, maintaining your attention on the most crucial performance gap is essential. Staying focused on the strategy requires deft skill but will save you budget and resources in the long run.

Everyone's heard of a five-minute elevator speech. Well, the one-minute talk track of your learning program can deliver similar results in a different setting. Rather than your personal brand, the one-minute talk track enables you to effectively communicate your program's why, what, who, and how. It's amazing the impact

## RESULTS

Undertaking a microlearning strategy doesn't necessarily require additional resources.

one determined person with one deliberate message can have on an organization.

Use current communication methods—they'll vary by organization and teams—to reach relevant stakeholders, that is, your learners, managers, and leaders. Those vehicles are the conduits you can and must use to reinforce your message.

Microlearning is an important part of the L&D practitioner's toolbox. But you must use it strategically—especially if you have limited resources.

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## What's Your Change Attitude?

Know how to work with people who view change differently from you.

BY B. KIM BARNES

In the past two centuries, society has advanced through a period of rapid technological and social change. When my parents were born, there was barely a movie industry, radio had yet to broadcast a news program, automobiles competed with horses for the streets, airplanes were a novelty, and offices still used manual typewriters.

While society is no longer surprised by the rapidity of change, that doesn't mean individuals are any

better at coping with it. Many factors drive organizational and institutional change—economic, social, political, technological, and others—and human beings must implement, manage, and adjust to it.

Having focused on change as an organization development consultant for many years, I have observed that people tend toward one of four basic attitudes that can shift depending on the nature of the change.

**Trailblazers** like to initiate change. They tire easily of doing things the same old way and will often change things just to keep from being bored.

**Early adopters** have an open attitude toward change. They are quick to see the advantages of doing things in a new way and are likely to be one of the first to volunteer to try an innovation.

**Skeptical questioners** want to know the costs and benefits of making a change before jumping on the bandwagon. They need to be convinced that the change will make things better, not just different.

**Traditionalists** are especially resistant to what they see as change for the sake of change. They see stability and consistency as important and will stand firm to conserve those values.

While I may see myself as having a consistent or preferred approach to change, my attitude probably varies. Am I the initiator or innovator? Does the change seem to threaten something I value? Do I have something to gain or lose? Was I involved in the decision?

Success as a leader or manager of change depends on having honest insight into your own assumptions and expectations—be aware of the filters through which you view change. When leading change, engage with people who see things differently and use those differences to achieve a better outcome, rather than contending to create a common view.

### **Embrace different viewpoints**

Too often, people see their own attitude as right—more aligned with organizational strategy or goals, more supportive of stakeholders, or more responsible. You may stay in your comfort zone to discuss upcoming or potential change processes or try to convince others of the rightness of your approach.

However, each of the change attitudes can add value to any large change process, assuming that—as a leader or supporter of the process—

you can step back from your preferred way of approaching that particular change and tap into what other attitudes can contribute.

### **Working with trailblazers**

The trailblazer attitude is essential at the beginning of any change process—companies need people to step out into the unknown and invite others to follow. The more unusual or innovative the direction of the change, the more important it is for formal or informal leaders to risk making the first move.

The trailblazer stops from time to time to make sure others are following or that some are striding ahead. Effective trailblazers keep their eyes on the prize but aren't afraid to change routes if they're not making progress or if nobody is behind them.

## **Success as a leader or manager of change depends on having honest insight into your own assumptions and expectations.**

However, note that trailblazers may go off in different directions from one another or lose focus or interest when they find themselves too far in front of the crowd. They need to be clear and agree on the outcomes they are moving toward and also take the time to consult with others.

If you want to gain trailblazers' interest or support, show them your vision, invite them to develop it with you, and ask them to be part of the launch once you're ready to move forward. If they get too far out, remind them to bring others along, and help them to do so.

### **Working with early adopters**

Early adopters are those who are willing to experiment with something new—they are curious and open-minded. While they may not be the

developers or initiators of a new idea, they are usually the first to try it out and can provide valuable feedback.

Prototyping is a valuable way to quickly and easily get feedback from early adopters about any downsides they experience or anticipate. That enables the innovator or change leader to make improvements in the idea or process before subjecting it to the harsher criticism they are likely to receive from people with greater resistance to change.

Invite early adopters in as soon as you can, give them a prototype to work with, and ask them to find issues or weaknesses as well as let you know what works. One challenge with early adopters may be their impatience with those who aren't willing to give the new product, process, platform, or paradigm a spin.

### **Working with skeptical questioners**

These employees are invaluable as you move toward launching your innovation or change initiative. You have already improved and strengthened the idea, perhaps through developing multiple prototypes and submitting them to early adopters for feedback. Because you are probably even more enthusiastic at this point in your development process, it may be tempting to skip another screening. However, overlooking skeptical questioners would be a mistake, especially if you are looking for broad support. Thus, invite skeptical questioners to review the idea.

You'll know who they are—it may be their general attitude, but often their skepticism is specific to a particular idea or type of idea based on their ex-

perience and vested interests (what they may hope to gain or fear to lose). Treat their questions and comments with respect, listen actively, and note their concerns. Avoid defensiveness.

It may work better to consider their thoughts, adjust your proposal to accommodate their issues, and then get back to them to show how you've used their feedback. That process is useful even if you don't make many adjustments, because it makes you aware of and gives you time to deal with what may be important factors you may have overlooked. At a minimum, it shows that you have taken the time to consider their point of view and enables you to explain how you've addressed their concerns.

If you're unwilling to seek out skeptical questioners or resist their questions, you may invite skepticism or cynicism that can get in the way of your change initiative. Asking for their feedback can keep you from making the rookie mistake of forming a decision based only on what you hear from the echo chamber—those who already agree with you.

In fact, if you start feeling defensive when a skeptical questioner criticizes your pet idea, change the dynamics

by inviting them to play devil's advocate and welcome their participation in this way, knowing that it will help make your idea more robust.

### Working with traditionalists

Getting traditionalists to accept and support a change process is essential to any large-scale effort's success. Once a critical mass of traditionalists supports the change, you can move forward with confidence.

Confidence comes from testing your ideas rigorously, improving them, answering the hard questions, and inviting participation by all who are affected by the change or are needed to make it successful. Alternatively, ignoring traditionalists' issues or identifying these individuals as problematic change resisters can lead to the failure of otherwise promising initiatives.

Remember, traditionalists are not about to get on board early—so anything you can do to learn about and ease their concerns will be helpful in gradually enlisting them. Engage them by learning what it is about the current situation that they value as well as what their concerns are about new proposals or solutions. Consider how you can reframe your idea so it

better fits with what they are comfortable with. (For example, printing press inventor Johannes Gutenberg called printing "artificial writing" to make it seem less strange.)

Traditionalists respect those who are already on board—especially if those individuals are skeptical questioners who have chosen to accept and support the change; invite them to influence those who are reluctant.

### All-encompassing input

Understanding your own attitude toward change—and knowing that it may shift based on the specifics of any change process—can enable you to appreciate the contributions of all approaches. If you're missing any of the four outlooks in your change management process, seek out some individuals who can speak from that point of view, and listen and learn from them. Doing so means that it may take longer to get where you're going, but when you do get there, you'll look around and realize that most people are there with you.

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## Growth and Leadership

Deltek's rising head count set in motion a leadership development program that would scale to the company's needs.

BY JODI ATKINSON

**W**hen talent development professionals think about designing a curriculum, they need to think about the future and the problems to address. Are you equipped with the knowledge, skills, and tools to confront current and projected issues?

Applying a preparedness strategy to real-world business problems can help to navigate and align your company's talent base with the competencies to drive the business toward organizational goals. Similarly, within an organization, defining a lead-

ership development curriculum that empowers employees to solve unique business challenges is essential to scaling leadership.

When companies provide their employees with the means to both strategically solve problems and contribute innovative solutions that affect the bottom line, employees are ultimately engaged in a meaningful way. Developing leaders within a community that establishes close networking relationships enables them to collaborate more effectively and be more successful overall.



## Deltek

**Industry:**  
IT

**Workforce Size:**  
3,000+

**HQ Location:**  
Herndon, Virginia

**Founded:**  
1983

### Taking a LEAP toward leadership development

In 2014, Deltek, a provider of solutions and services for project-based businesses, faced the challenge of how to best scale leadership in response to the company's continued growth. At the time, the company had more than 1,500 team members in 17 locations around the world, but growth plans predicted the head count would nearly double within the next five years. In fact, today Deltek has more than 3,000 employees in 22 locations ranging from the US to the Philippines, and it is now part of the Roper Technologies portfolio of companies.

Given the anticipated growth of the company's talent pool, the global learning team set out to successfully develop high-performing leaders who could meet the challenges that lie ahead. Several key questions guided the team's work:

- How could we best confront anticipated challenges and align the talent base with the competencies needed to drive the business toward its organizational goals?
- What methods would best prepare the next generation of leaders for real-world issues and arm them with the skills and strategic focus needed to drive future success?
- How could we engage existing leaders and foster a broader culture of healthy leadership at all levels of the company?

We focused on using existing resources, driven by a globally dispersed team of instructional designers and program managers, to create development programs accessible for employees at all stages of career development. The team set a one-year deadline to achieve the goal and started working.

### Program design

With a steering committee comprising executives who had a passion for development leading the company's efforts, we collaborated to align competencies for three program levels: director, manager, and individual contributor. We named the resulting programs LEAP (Leadership Engagement with Awesome People), LAMP (Leadership Accelerator Management Program), and LEAD (Leadership Exploration and Discovery).

Program managers created pilot versions that included blended learning formats comprising self-directed study, online content, and live instructor-led sessions delivered via an online platform. We invited executives with backgrounds in specific competencies to take part in facilitating director- and manager-level programs. With final program designs in place, we further collaborated with our cross-functional HR advisory board on best practices and content relevancy to ensure that the planned curriculum met organizational needs.

Leadership played a significant role in helping to vet our materials and delivery model during and after each program's pilot launch. Additionally, select executive team members continued to take part in program facilitation on an ongoing basis.

### Program implementation

With a clear vision, we first launched a pilot of the director-level initiative, LEAP, which is a participant-nominated program delivered across a four-month period both on-site and virtually to a global cohort of 15–17 participants.

For every cohort, a two-day on-site kickoff event brings LEAP participants together for foundational team-building activities, personality assessments, setting program expectations, and initial leader-led activities. The full LEAP program includes self-directed learning delivered via an online platform, further leader-led activities, and social networking for collaboration and reflection.

Senior executives, including President and CEO Mike Corkery, facilitate the program's leadership challenge chats—providing participants with real business challenges for which they may propose solutions during a capstone project. To support development of that final project, other leaders deliver activities on topics such as strategic thinking, fostering vision, innovation, employee engagement, influence and persuasion, managing conflict, collaboration, and relationship building.

At the program's finale, participants work in teams to present their special projects to an executive panel that provides feedback on the feasibility of the project's implementation. The panel identifies one project as a clear winner for implementation, though additional projects may also move forward through the assistance of an executive sponsor.

Competencies such as strategic planning and taking action based on the changing business landscape are both program requirements and skills further developed during LEAP, with participants learning to be proactive strategically rather than being responsive to only short-term demands. There is also considerable focus on teamwork.

The LEAP experience continues to evolve with feedback incorporated from past participants. For example, learners report that networking with senior leadership has been a program highlight; they note that having such relationships helps them drive more projects to success. Additionally, a panel of rotating steering committee members comprising program grad-

## Participants report that networking with senior leadership has been a program highlight.

uates and stakeholders helps ensure continued program effectiveness. The program is now in its seventh cohort and is an integral part of Deltek's leadership development.

### Continued program growth

Following the LEAP pilot, we built additional programs on similar formats to engage employees and meet our development goals. We designed the manager-level leadership program, LAMP, to develop and enhance new and existing people managers' leadership skills in a six-month time period. The program focuses on foundational management competencies, recruitment practices, performance management, and leading and building teams.

At the heart of the LAMP curriculum is the learning journey, an ongoing exercise in which participants record their reflections after completing various components of the program's self-directed curriculum. Participants then debrief their learning with senior leaders, who facilitate discussions and share their own experiences. We encourage all participants to share reflections with their managers during their regularly scheduled performance management discussions, which enables employees to synthesize competencies they've learned with real-world challenges.

Meanwhile, the individual contributor-level program, LEAD, offers a self-directed curriculum that focuses on the Deltek values at a foundational level and enables employees to explore leadership through reflective activities and goal setting. Program participants practice applying the values through a self-directed 30-day curriculum, and

they have the option to share their goals and reflections within a community networking space. The program evolved to be foundational for all new hires within the onboarding program, providing a platform for envisioning how they will continue to live the values going forward.

To support team leads—a role that has become more prevalent as the company has grown—we developed the LEAD 2 program. We deliver this three- to four-month program twice annually to small cohorts, emphasizing how to facilitate team productivity through project management as well as project- and task-focused scenarios. Participants engage in role-based delivery for live practice, completing exercises and sharing feedback with one another, while relying on their managers as mentors. Topics include challenges participants may face with building teams, problem solving, decision making, delegation, managing performance, influence, and recognition. A senior leader also contributes as a featured speaker on performance coaching.

### Results and lessons learned

The programs require that team members dedicate additional time to their professional development, which in turn has cultivated a culture of learning. Team members focus on their professional development and truly own their careers. Deltek has also seen that employees' efforts enable a broader, company-wide culture of learning and agility. Even when the LEAP program ends, directors reinforce to their staff the value of prioritizing learning.

Having a common understanding of what it means to foster vision, collaborate, and develop others ensures that all employees are using the same methods to work toward common goals as a united team. This culture keeps the company competitive; employees with a growth mindset continuously ask *what if*, empowering everyone to do more.

In addition to using the Kirkpatrick model from inception to evaluate our programs, in 2019 we began tracking

upward movement in program competency growth. For the LEAP program, 2019 participants and their managers reported a 12 percent competency improvement just three months after program completion. And six months after completion, participants rated themselves 47 percent greater in competency skill compared to their rating before the program began. Further, year after year, Kirkpatrick Levels 1 and 2 indicate an increase in program effectiveness with feedback being used to evolve each program cohort.

Beyond metrics tracked for program effectiveness, the company also sees success measured within employee engagement scores, which last year were measured at 86 percent out of 100 percent. Enabling graduates to set a vision for their teams and propose solutions that have real business impact has led them to be part of something about which they feel passionate.

### Continuous development

As a deliberately developmental organization, Deltek understands that every employee is integral to its success and encourages all team members' growth and development. To support that, we asked employees last year to commit to completing a recommended 40 hours of learning annually, using both internal and external resources, as part of their continuous development going forward.

By creating an environment in which all employees can continuously learn from one another, contribute through innovative discussions, and explore alternative approaches, Deltek has enabled its talent to have a significant business impact within a meaningful, inclusive culture. At the end of the day, employees know the company values their contributions, and leaders at all levels understand that for the company to succeed year after year, it must invest in its people.

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# MAKING THE SWITCH

This six-step audit process will help you convert in-person training to a virtual course.

BY MELISSA GREY SATTERFIELD AND TRACY MONTANO

**B**eware of creating a webinar when converting an instructor-led training (ILT) program to the virtual classroom. Oftentimes talent development professionals make that mistake because of an innocent assumption: We can simply deliver the instructor-led content in the exact same way in the virtual classroom.

Some instructional designers spend hours upon hours making sure an ILT course's key learning points are all addressed in the time allocated for the virtual classroom; however, they put little to no thought into how the course will translate to learners seated at their computers. The end result is extremely presentation-heavy and unengaging—something that looks more like a webinar than a virtual classroom course.

A webinar is primarily used to present or share information, and most of the time, the communication flows one way—from the presenter to the attendees. In contrast, a virtual classroom course allows for two-way communication between the facilitator and the learners and includes plenty of opportunities for learners to practice the skills and knowledge the facilitator presents to them. In addition, participants receive feedback after each application exercise or activity, so they know what they've done well and how they can improve.

With a goal of creating interactive, performance-based virtual classroom training, the instructional design team at Langevin Learning Services worked together to develop a conversion process that would ensure our virtual classroom courses cover the original ILT content; are visually appealing, interactive, and engaging to participants; and include application and practice methods conducive to the virtual environment.

Central to the conversion process is a course audit—a method that ensures the result of a conversion is an effective virtual classroom course aligned with the objectives and content of the ILT course.

To complete the audit, we use a worksheet that helps guide the process and enables us to document the findings. The audit takes six steps.

### STEP 1

#### Identify the ILT course's tasks and subtasks

The best place to start the audit is to refer to the ILT course's lesson plan or outline to pinpoint the tasks and subtasks. At a high level, think of them as the whats and how-tos.

A task is defined as what someone does on the job. For example, if grocery store clerks are responsible for processing a grocery order, that is what they do. A task is a collection of subtasks, and each subtask is a logical grouping of five to nine how-to steps. In our example of processing a grocery order, the subtasks are greet customer, process payment, and bag groceries.

When identifying the tasks within the ILT lesson plan, look at the course objectives. Objectives are usually written as verbs followed by nouns such as *operate a forklift* or *plan a project*. The tasks and objectives may not be identical, but you should use

similar wording in both. Likewise, you should write subtasks in the same verb-noun format.

### STEP 2

#### Identify the presentation and application methods

Presentation and application are two crucial components of a performance-based training program, regardless of the strategy. Instructors use presentation methods to deliver the content, and application methods enable learners to practice what they've learned. The methods are fairly easy to identify in an ILT lesson plan by answering two questions:

- How is the content being delivered?
- How are learners practicing?

For instance, when training grocery store clerks on how to greet customers, an instructor may deliver the content using a discussion method: As a group, participants discuss the correct format, tone of voice, and facial expressions required to ensure customers feel welcome from the moment they step up to the register. Then, when it's time to practice what they discussed, participants take turns role-playing how to greet customers correctly.

Ideally, the ILT lesson plan includes both a presentation and application method for each subtask. However, if you notice a subtask without either method, view it as an opportunity to design something new and unique for the virtual classroom.

### STEP 3

#### Document supplemental materials

Add to the course audit worksheet any documents or files that contain relevant content pertaining to a subtask. If, for example, the ILT participants receive a job aid when learning how to greet customers,

**FIGURE 1. COMMON VIRTUAL METHODS BASED ON CONTENT TYPE**

Content Type	Presentation Method	Application Method
Technical	Demonstration	Practice exercise
Interpersonal	Behavior modeling	Role play
Conceptual	Brainstorming	Case study
All Types	Discussion	Quiz

## FIGURE 2. SAMPLE COURSE AUDIT WORKSHEET

Task/Topic: Process a grocery order.							Time: 70 minutes		
ILT Breakdown							Virtual Classroom (VC) Decisions		
Subtasks/ Subtopics	Method	Lesson Plan Pg. #	Slide #	Participant Manual Pg. #	# Minutes	Notes	Method	Tools	Notes
Greet customer.	Discussion	32	17	65	5		Discussion	Chat	
	Role play	33–34	18		5	Update procedures to work in the VC.	Role play	Breakout rooms	Create a different role play for each group.
	Peer feedback	34			5		Peer feedback	Verbal response	
Process payment.	Demonstration	35–38			5		Demonstration	Video streaming	Embed video into the slideshow.
	Practice exercise	39			10	Validate that the video works in the VC.	Critique	Video streaming	Embed video into the slideshow.
	Peer feedback	40			5		Peer feedback	Verbal response	
Bag groceries.	Lecture	40–45	20	78	8		Discussion	Private chat	
	Game	46–48			20		Game	Web browser	Company website

write that down. It's important for you to note that the job aid already exists so you can potentially repurpose it for the virtual classroom course.

It's also necessary to validate whether supplemental materials such as videos, audio clips, or games are compatible with the virtual classroom platform you'll be using to deliver the training (for example, if a video is saved in a .flv format, ensure the virtual platform can read that type of file).

### STEP 4

#### Determine how long it takes to deliver the subtasks

A common misconception about converting ILT to the virtual classroom is that instructors can deliver the course content in less time in the virtual classroom. Although this may be the case for some

activities, other exercises may take more time to deliver effectively in a virtual environment.

Consider a role-play exercise in the traditional classroom. It is easy to set up because participants can quickly group themselves by moving their chairs. But in a virtual course, setting up a role play takes longer because the facilitator will need to provide instructions on such factors as what participants can expect when moving to a breakout room and how the audio will work.

Calculating how long it takes to deliver a subtask in the traditional classroom aids in determining how much time should be allocated in the virtual classroom and whether any time-consuming chunks of content may require more effort to convert.

Once you've completed steps 1–4, it's time to make design decisions that will determine the content delivery methods for the virtual classroom.

## STEP 5

### Select the presentation and application methods

The primary goal in converting an ILT course to the virtual classroom is to align the virtual training as closely as possible to the in-person training. Thus, you must figure out whether you can repurpose any ILT methods. To help you decide, think about how the method will be implemented in the virtual classroom.

- How long will it take to deliver the method in the virtual classroom?

- Is there a way to make it interactive?
- Will the tools available in the virtual platform enable the instructor to effectively deliver the method?
- Can you repurpose the speaking points, as written, from the ILT content?

If you can envision how to successfully implement the ILT method in the virtual classroom, then you can repurpose it. However, if you decide that it won't work in a virtual environment, you'll need to come up with an alternative. For instance, if time constraints make using a discussion unwieldy, choose a method that requires less time to deliver in a virtual

**FIGURE 3. BEST DELIVERY TOOLS TO USE FOR VARIOUS METHODS**

		Annotation tools	Application sharing	Audio streaming	Breakout rooms	Chat	Content sharing	Feedback/status icons	File download/sharing	Note pod	Poll	Private chat	Verbal response	Video streaming	Web browser sharing	Whiteboard
Presentation	Brainstorming	▪			▪	▪		▪				▪	▪			▪
	Demonstration		▪	▪			▪		▪					▪	▪	▪
	Discussion			▪	▪	▪	▪	▪	▪	▪		▪	▪	▪	▪	▪
	Lecturette	▪		▪		▪	▪	▪	▪		▪		▪	▪	▪	▪
	Q&A	▪				▪	▪	▪		▪	▪	▪	▪			▪
	Reading						▪		▪						▪	
Both	Game	▪			▪	▪	▪	▪	▪	▪	▪	▪	▪		▪	▪
Application	Case study			▪	▪	▪	▪	▪	▪		▪	▪	▪	▪		▪
	Practice exercise	▪	▪		▪	▪	▪		▪	▪		▪	▪		▪	▪
	Quiz		▪	▪		▪		▪	▪		▪	▪		▪	▪	▪
	Role play			▪	▪		▪		▪				▪			▪

classroom. Consider using a graphic association lecturette or assigning some reading for participants to do as intersession work. Of importance is choosing a variety of methods to ensure the course is an engaging and interactive experience for learners.

Notice in the sample course audit worksheet (Figure 2) the difference in methods for the task of processing a grocery order. The presentation method for the third subtask, bag groceries, is a lecture in the ILT version, but we chose a discussion for the virtual version of the course. Why? Because lectures can be monotonous and boring. They can be a risky choice for a virtual course, because learners can easily check out and do other things.

Given that, using a discussion over a lecture is a better choice because it involves the learners, engages them, and enables everyone to contribute. In addition, there are different options when it comes to how a discussion unfolds in the virtual classroom—it could take place as one large group or in several smaller groups using breakout rooms.

## STEP 6

### Select a delivery tool

After you've chosen a method, determine which of your available virtual platform tools is best suited to implement it. When choosing a tool, consider how long it will take to deliver the method using that tool.

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OTHER THINGS.

If you are limited to five minutes for a discussion, it may be better to have participants discuss the content using the chat function instead of having each participant respond verbally.

The exciting part is that you have myriad options—this is where your creativity comes into play. Once you know what the platform is capable of, you can start choosing the tools and features that will bring the content to life. Remember: Aim for variety. That ensures you are maximizing participant engagement by having them use different tools throughout the course.

For those who are new to the conversion process, selecting the right tool can seem a bit overwhelming at first. Which tools work best with the methods you've chosen? What should you do if there are constraints regarding the tools available within the platform?

We've taken some of the guesswork out of that by creating Figure 3. Listed vertically along the left side of the chart are the most common presentation and application methods, and the more common tools (across most virtual classroom platforms) are along the top. The dots represent which tools work best for each method.

Every method has at least three different tools that instructors can use to implement it. For example, if the course entails using a demonstration as a presentation method, seven options are available; if a role play is the chosen application method, consider using one of the six listed tool options.

Set yourself up for success with all your conversion projects by taking the time to learn what tools and functionalities are available in your organization's virtual platform. Doing so will help you choose the most appropriate tools to make your methods come alive and help you create an engaging virtual learning experience for your participants. A bonus is that you may convince naysayers that the virtual classroom can be just as interactive as ILT, if not more so.

### A conversion road map

In the end, as seen in the Sample Course Audit Worksheet, you will have an at-a-glance road map to developing an interactive, performance-based virtual classroom course. Once you have completed this audit, converting the ILT content to the virtual classroom will seem effortless.

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THE



# EXPERIENCE

Using augmented reality to engage learners  
isn't as difficult as it seems.

BY BETTY DANNEWITZ

# W

hat is augmented reality? That's a question I asked my manager as we discussed recent senior management requests. The senior managers said they wanted to "introduce something innovative to the department, maybe something like augmented reality." I had no idea what AR was, so I did what we all do when we don't know something—I googled it.





“Oh, AR is Snapchat,” I said, furrowing my brow. But what is an insurance company going to do with face filters?

Sound familiar? You may have lived a version of that story where senior leaders want to implement innovative ideas that they briefly read about or heard about at a conference, but you have no idea where to even start.

AR is experiencing content superimposed over your existing environment. For example, imagine you are sitting in a movie theater waiting for your show to start. A prompt comes on the big screen telling you to open your smartphone camera and point it at the screen. When you do, an animated soda cup standing on the seat in front of you suddenly appears. The cup is giving instructions on where to find the concession stand. You look away from your smartphone back to the big screen, but the cup is not there—it only appears on your smartphone screen, superimposed on the seat right in front of you.

That’s experiencing AR.

Museums and retail stores also have begun capitalizing on using AR to enhance the customer experience. For example, visitors to the Art Gallery of Ontario in Canada can see an entire exhibit of paintings come to life in AR via their smartphones. Likewise, IKEA and Target use AR to enable customers to visualize how a piece of furniture will look in their homes by tapping a button in the store’s respective app. The item will appear on the screen as its true size and shape for customer review. Consumers get the information they need to make an informed decision, engage in a different way with the product, and have a little fun.

What if you could harness the engagement and fun of AR in a simple, inexpensive way in your learning initiatives? Could you have an impact on learners in a unique way? AR is a powerful engagement tool that enables talent development professionals to incorporate points of engagement and increase learning effectiveness throughout blended learning solutions.

### **AR at its simplest**

AR is different than virtual reality in that people experience the latter while wearing a special headset that completely immerses them in a virtual environment. Often when AR comes up in conversation, most people think of science fiction movies such as *Minority Report*. In such highly entertaining

movies, images appear in front of actors, and they use their hands to move them aside and around. While that is AR brought to viewers via Hollywood special effects, it’s not the use case for talent development.

My familiarity with AR began with that initial conversation with my supervisor about innovation. A new creativity was sparked in me to find out more about what AR was as well as whether and how I could use it with learning content. I sought out opportunities to experience it firsthand and found some AR experts who had experience in L&D and friended them quickly. I also attended a learning conference workshop on how to create AR.

Then I started creating simple AR experiences with a web app. I sprinkled those experiences in as engagement points that would literally pop up in the curriculums. For example, as the participants moved through e-learning or classroom sessions, they would come upon an AR marker—a symbol indicating there is AR content for them to experience—scan it with their mobile device, and experience content through AR.

I created dozens of AR experiences centered around public information that we were already teaching employees, such as the organization’s core values, company history, and details about cities where our offices are located. I displayed these public information AR experiences in the office

hallways and featured them in all employee contests and in new-hire training scavenger hunt activities.

The more I learned about AR, the more I realized its real power. Could I use it to explain information? Yes. How about to test understanding? Sure could. I also discovered something else, something innovative that I consider a gamechanger.

### **A gateway to culture change**

As I continued to create, it became clear to me that AR could help bridge the gap between how people learn at home and how they learn at work. Doing so enables talent development professionals to change the learning culture in our organizations.

When you are at home and need to learn how to do something, what do you do? Most often, you would access your personal device, search online, and learn. In many industries, using a personal device on work time carries a stigma because others may perceive it as not working or slacking off. But for many employees, learning on their personal devices is easy, normal, and often preferred.

If talent development professionals can make it safe for employees to learn on their personal devices at work like they do at home, culture change will follow close behind. The key to culture change in learning organizations is small, easy shifts that happen gradually and intentionally.

Implementing simple and intentional pop-up AR experiences throughout your learning solutions is a great way to jump-start culture change. AR is a gateway—it opens the door to other technologies and ways of learning that you may not have thought about previously. As you begin to think differently, you likely will be motivated to design differently, and your audience will begin to learn differently.

### **Five free ideas**

When you start to implement AR in your learning efforts, you will open employees' interest in learning. The rest of the talent development team will also begin to think differently about learning, and that is when new creativity will begin flowing. To get started, here are five ideas.

**Business cards.** AR business cards can be a huge hit and wildly popular. Start by creating

them for the talent development team, then use those as prototypes to pitch them to the company's directors and managers.

Create interactive AR experiences with links to the company website, a video introduction, or hot buttons that dial a number or cue up an email and contact info that users can download directly to their phones. All it takes is printing the AR markers on stickers and affixing them to existing business cards, or you can print the markers directly on the business card or add them to an email signature. This is especially helpful if your company is a customer-facing business and wants to give an innovative introductory experience.

**History lessons.** Most organizations look to educate their employees on the company narrative. Many have long, rich histories full of interesting facts, statistics, and stories. AR is an engaging way to share those details.

**I CREATED DOZENS  
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You can use rapid authoring tools to create e-learning content about your company's history or short videos of the company president or another leader telling a story about how the organization began. Place that content into an AR marker and position the markers around the building or on internal websites. Then, market it to existing and new employees. Make it even more fun by adding a level of competition to it (see next idea).

**Scavenger hunt.** Once you have created several AR experiences, combine them with some competition and create a scavenger hunt. Position the markers around the

building, create clues to get employees to the markers, pair the participants up, and send them on the hunt. You can even do this virtually with an online scavenger hunt.

The participants will learn about the company and build camaraderie with others in the business while having some fun. If you offer a prize, that's even better. While new hires are

going around the building scanning AR markers with their phones, other employees are sure to take notice and become curious about what is happening—and they may even scan the AR marker and learn too.

**Trivia questions.** Using AR in gaming is a great way to enhance its effectiveness—especially when there is trivia involved. Cre-

## AR FOR SAFETY TRAINING

I first encountered this exciting use case for augmented reality at the gym. The small private fitness facility relies on one-to-one instruction for procedure, form, and safety of its equipment. The instruction is the same every time—and for Ken the trainer, it felt monotonous and rehearsed as he repeatedly recited the material. Ken needed to find a way to get this critical information to clients when and where they needed it. The solution was AR.

The company placed AR markers on the wall to welcome clients to the gym and also on the fitness equipment to create an effective way for clients to learn about the machine they were about to use. The markers enabled clients to have instant access to demonstrations on how to safely use the equipment at the time of need. Here's how it worked:

A client approaches a machine and finds a safety label with an AR marker. Using their smartphone, they scan the marker, at which point a menu appears on their screen with optional moves they can perform on that machine. The client taps their choice and a short YouTube video launches, instructing them on the proper and safe procedure for that move. They are now fully prepared to do the exercise safely and with proper form.

This simple application of technology at the moment of need created a safer environment and improved overall service at the gym and engagement during workouts.

ate a review game that is driven by trivia facts about your business or department. I recommend a generic game board with colored squares, or you can create a virtual game in an e-learning authoring software. In the game, assign certain squares to AR consumption. When participants land on those squares, they get to receive and answer their question via AR.

**Magic messaging.** If you find that you are often sending out quick snippets of information or updates to staff but you are not sure whether they are even reading them, AR can help. Place an AR marker on everyone's desk or workstation and remind employees to scan the marker on a regular basis, maybe once a week on Monday.

Then, update the content in the marker each week. When employees come in on Monday morning and scan the AR marker, they will get a fresh set of the latest information. Get creative with this so that employees will want to keep the AR marker out and visible.

My organization implemented all those ideas, which were met with enthusiasm and excitement. Participants were engaged in the content, excited to show off their AR business cards, and eagerly awaited the new messages that would pop up with the magic messaging.

### Before diving in

Now that you have several examples of how talent development departments can use AR, it's time to think about the best way to move forward.

**Create a clear vision.** Start by establishing a vision for AR in the learning function and follow it. Outline why you want to use it, what you can do with it, and how to make those things happen.

I found it helps by identifying a problem that you need to solve. Many companies are looking to solve how to get their participants engaged in learning content or communicate in a new and innovative way a concept that employees see the same way over and over again. Be clear about what that problem is and how AR could help solve it. By completing this critical first step, you will streamline your creation process and avoid the scattered focus that comes with fresh creativity and new technology.

**Focus on what you can do rather than what you can't.** You'll want to research

apps and vendors (some offer low-cost subscriptions) that enable you to create AR experiences. Based on your chosen product's features, review your curriculums and look for small bites that you can translate into AR—for example, content pieces that the talent development team delivers the same way every time that need a boost in engagement. Then start creating prototypes. Those experiences will begin building your skills in AR creation and enable your audience to get used to the idea of learning in AR.

**Talk about AR socially.** Discuss AR with colleagues, managers, and friends. Join conversations with those outside your organization with whom you can bounce ideas off and hear about how they are implementing AR. Make it a personal mission to socialize the idea of AR in learning and show off the prototypes you have created. Present the prototypes to your stakeholders when you pitch your idea so they can experience it and get excited about the possibilities with you.

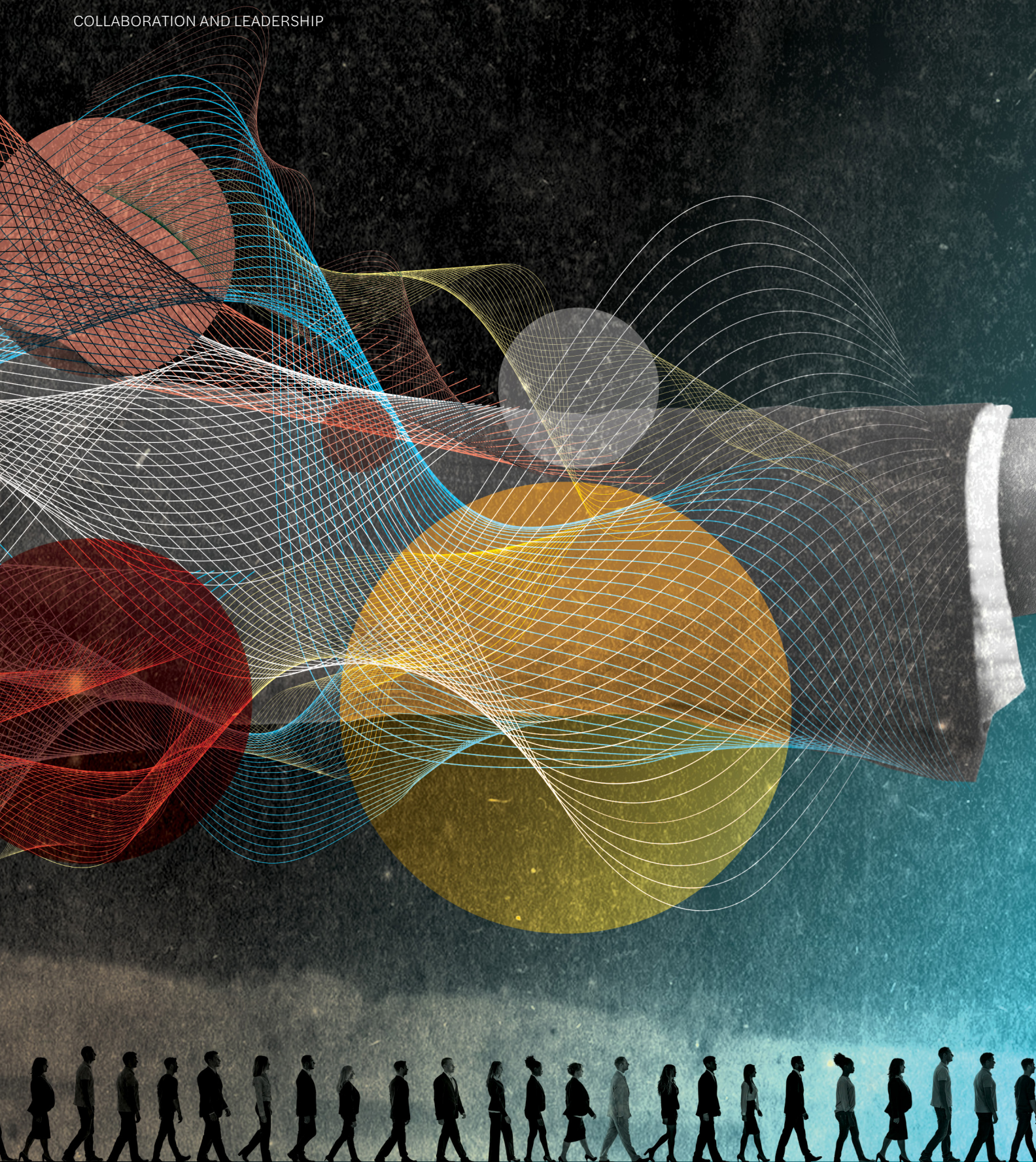
## USING AR IN GAMING IS A GREAT WAY TO ENHANCE ITS EFFECTIVENESS.

**Connect and learn more.** Keep learning about AR. Connect with people on LinkedIn who are talking about AR in learning and in other industries. There is huge crossover in marketing with AR and a lot to be learned from its application in that space.

Adding AR to your blended learning solutions will increase engagement and effectiveness for your learners. As you continue to build AR into your existing and new curriculums, you will see a shift in your learning culture. Learners will look for the AR element, and the talent development team will create change in your organization.

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# The Path Forward Amid COVID-19




A key necessity will be adaptive leaders with the skills to manage complexity and build resilience.

BY GLORIA TAM







**D**uring the past few months, COVID-19 has transformed our lives in ways many never had thought possible. As the outbreak became more widespread and volatility and uncertainty increased, companies across sectors called for innovative, collaborative, and decisive measures to fight the complex unprecedented social and business challenges. The imposed limitations to both in-person business activities and travel has forced millions of business meetings, transactions, and negotiations to take place virtually. The sudden crisis also has made many previously standard practices irrelevant and obsolete.

Business models had to change overnight, supply chains overhauled, and customer engagement tactics reoriented. Many companies promptly responded to fight the pandemic to help support the “new normal” in society. For example, at the start of the outbreak:

- The French luxury brand LVMH made headlines by transforming its perfume production to produce hand sanitizer for medical professionals.
- Scandinavian Airlines started offering its cabin crew fast-track training in basic hospital duties after realizing it had to lay off a significant portion of its workforce.
- Medical companies, such as Abbott Lab in the US and the South Korea biotech firm Seegene, developed new diagnostic kits in record time to help millions of people worldwide test for COVID-19.
- Dyson started repurposing its employees’ work to building medical equipment, which led to the addition of tens of thousands of ventilators for healthcare facilities via a rapid prototyping and design process that took only 10 days.

The speed and innovative nature of those responses from the business community was overwhelming. This critical moment in history has highlighted many examples of truly transformational and inspirational leadership—leaders who manage and navigate through complexity, those who connect and mobilize teams to reshape business and society, and the ones who build resilience in their organizations and community over time.

Now more than ever, businesses need talent who can embrace these hallmarks of adaptive leadership. But what exactly are those traits, and how can companies start cultivating employees to exhibit the skill set of dynamic leadership?

### **Leading with purpose: Bringing the best out of organizations**

It is clear from the crisis that the leaders who create the most value and respect for their businesses are those who can navigate and rally the stakeholders—the ones who win both the hearts and minds of their employees, their customers, and the community. And those leaders instill confidence and provide a path forward for employees. Their leadership permeates the workplace, and their purpose is manifested in their actions and behaviors. Their commitment goes beyond just their employees or the business impact; they understand that at both good times and—in particular—during crises, a clearly articulated mission and meaning is critical.

Whether it is Dyson CEO James Dyson or Seegene CEO Chun Jong-yoon, their intensity and purpose helped engage and motivate their teams to churn out innovative solutions in no time.

But how is purpose defined? Numerous thought leaders, from Nick Craig to Simon Sinek, have explored the concept of purpose in leadership. For a leader, purpose captures the *raison d’être*, the very reason for existence. Taken holistically, it represents a union of an individual’s

unique characteristics and character, translates values into actionable goals, and shapes the guiding principles of how someone goes about engaging with the relevant stakeholders and the world.

- purpose: an organization's or individual's North Star, remaining fixed even as strategies, circumstances, and time change
- values or beliefs (why): an individual's or organization's essential and enduring tenets that hold even if they become a competitive disadvantage
- guiding principles (how): value-aligned principles that define the approach an organization or individual takes to fulfilling their purpose
- goals (what): representation of the future states that could change in response to changing contexts, new growth, or other motivations.

As the World Economic Forum's Klaus Schwab puts it, the pandemic will reveal "which companies [and leaders] truly embodied the stakeholder model, and which only paid lip service to it." To build a responsible business in today's world, purpose will be one of the critical recipes of leadership and talent success.

Helping leaders understand the different facets that result in a purpose-aligned organization, and how to evangelize such, will turn crisis and challenges into key leadership moments toward coherent, value-added actions.

This critical moment in history has highlighted many examples of truly transformational and inspirational leadership.

### **Adaptive leadership and systems thinking: Predicting the unpredictable**

COVID-19 saw no geographical boundaries as it swept across the world in a matter of weeks. Such is the nature of the globally interconnected, complex world we live in. And the pandemic is not the only challenge global leaders are facing. From climate change to digitization and automation to political trade wars, no one is immune to the global trends that are affecting the existing interconnected systems.

Systems thinking, first started as an engineering instrument by Professor Jay W. Forrester and team at the Massachusetts Institute of Technology's Sloan School of Management in the 1950s, is increasingly gaining traction in leadership and management. Think of systems thinking as a suite of tools for deciphering systems and predicting events and patterns. These may include how to map causality relationships (using causal diagrams), how to analyze an event or behavior via system decomposition and multiple levels of analysis, or the use of sense-making tools to analyze situations.

In the *Harvard Business Review* article "Predicting the Unpredictable," Eric Bonabeau writes, "The independent actions of myriad people often result in a global behavior that bubbles up from their local actions," and systems thinking, complexity theory, and an understanding of emergent phenomena help leaders predict the unpredictable even if "emergent phenomena have been devilishly difficult to analyze, let alone predict."

Take system dynamics for example, which incorporates the principles of feedback and secondary effects to help decipher critical pivot points and identify solutions that could switch a system from one state (an attractor) to another (a different attractor). Mapping the systems expertise to the coronavirus crisis reveals that every S-curve of a country's pandemic spread is essentially a system dynamic case in action.

What pivots Italy or New York from a mild to a severely disrupted state, and



what feedback of events debilitated the healthcare system? Juxtapose that with what happened in regions such as Taiwan and South Korea—what reinforcing mechanisms helped control the epidemic peak?

A systems expert can zoom in and out of a situation, understand holistically how interacting components in a system lead to different kinds of consequences—intended or unintended—and use the knowledge of such emergent phenomena to predict outcomes and therefore determine solutions and feedback mechanisms that prevent the system from falling into an unfavorable or vulnerable state.

The interactivity of system components is key, and using Taiwan as an example, the types of interventions by themselves may be as simple as standalone measures (such as social distancing and testing) but together form a set of complex reinforcing mechanisms. This includes the Ministry of Health and Welfare testing and tracking cases, the digital minister using artificial intelligence to create real-time updates for citizens (about matters such as risky areas to where to buy face masks), and the National Immigration Agency's work on restricting travel as well as how citizens respond to such new policies and resources.

### **Agile innovation: Survivor's mode or inventive mode?**

One silver lining I have heard cited on the pandemic is that while it has disrupted everyone's normalcy, it does make perspectives fresh and ideas new again, and what may not have been possible before suddenly is.

As MIT lecturer Blade Kotelly notes: "We've entered an unstable and economically volatile period that may serve up the

biggest challenges of your career ... and will require every business to innovate in ways they never have before."

In this time of complexity, leaders often need to step out of the box to identify creative solutions and navigate challenges. Leaders who are agile have also taken the opportunity to embrace decision-making processes that allow for more innovative ideas while imposing less constraints.

If a new ventilator prototype can come about in 10 days, how might leaders use similar design thinking and rapid prototyping processes to redesign business practices and routines that are no longer relevant or have been made obsolete due to the outbreak? How could a leader apply the experimentation concept and the failure-is-acceptable mindset of innovation and entrepreneurialism to transform business models, systems, and processes? And in embracing the core principle of design thinking, how could a leader embrace empathy in all innovative design processes?

According to the Cynefin decision-making framework developed by David J. Snowden and colleagues, to navigate in a world of complexity and uncertainty, the "temptation to fall back into traditional command-and-control management styles—to demand fail-safe business plans with defined outcomes" may not respond well to the challenges at hand. A complex situation requires a "more experimental mode of management"—a probe-sense-respond approach—to respond to opportunities or patterns that emerge (see figure).

In the age of a pandemic outbreak and the aftermath, new information comes into play every day, employees' and customers' situations are more fluid, and competitors' moves may be much less predictable. The relationships between causes and effects are also less obvious, and the decision paths a leader takes must be created step by step in an agile approach—complemented with sensing of the situation and deliberate testing and experimentation to refine and tweak the response.

Divergent problem-solving techniques also play a big role in navigating challenges, especially when traditional problem-solving and analytic approaches may not present and lead to a needed solution. Such a divergent process requires leaders to take themselves out of their normal confinement or perspectives and use heuristic, sense-making, and sense-breaking techniques to help narrow down the solution among the many creative

# Cynefin Decision-Making Framework



ADAPTED FROM "THE NEW DYNAMICS OF STRATEGY: SENSE-MAKING IN A COMPLEX AND COMPLICATED WORLD" BY C.F. KURTZ AND D.J. SNOWDEN.

ideas developed. And creativity and innovation must not necessarily be an invention of a new product or service.

From how leaders orchestrated team meetings last week to how they reinvent an expense policy today to how they put together a new customer engagement process tomorrow, agile innovation can happen everywhere and every day in organizations, making businesses more resilient as a result.

This global pandemic has brought an important lesson on inspirational and adaptive leadership. It has enabled more leaders to understand what it means to navigate complexity and instill purpose. And it has forced leaders to be agile, innovative, and entrepreneurial while making consequential decisions that bring companies to a new state of normalcy and make businesses better prepared for the next global challenge.

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# Cut the **Fat**

BY AJAY M. PANGARKAR AND TERESA KIRKWOOD

Use lean learning  
to demonstrate  
business impact.

**M**any people toss around the term *lean* vigorously without a true appreciation for what it means or implies. For many, the first instinct is that lean is about slashing budgets to reduce costs. That is far from the truth.

Lean thinking, as James Womack and David Jones initially defined in their book on the concept, is a collaborative performance improvement effort that systematically removes waste and seeks out value within processes, pursuing perfection to ultimately deliver innovative products or services profitably.

What does lean mean to learning? In the current environment, lean is no longer an option but rather a stakeholder expectation in every aspect of organizations. The reality is constant and disruptive change in the market and environment, leveraging the capability and capacity of advanced technologies, and—most pertinent—the need for timely and relevant knowledge. L&D is now front and center and must contribute to organizational lean thinking—but also deliver learning that is lean unto itself.

Regretfully, many operational leaders continue to believe that lean is about doing more with less. That fallacy leads to inappropriate lean applications, such as slashing budgets and resources, focusing only on short-term profitability. In turn, that leads L&D practitioners to inappropriately apply misinformed lean thinking, developing quick-fix solutions via the latest learning technologies rather than effectively using available resources. Doing so results in an illusion of increased efficiency and savings.

Applying technology to develop and deploy learning is a step toward lean but is not inherently lean. Further, implementing technology to make learning faster or shorter, or even attempting to prove it paid for itself, will not convince stakeholders that the L&D function is lean.

### **Recognize lean learning within operations**

Believing lean is only about reducing costs is too simplistic. Lean thinking involves using existing resources to deliver maximum value while reducing, and even eliminating, nonvalue activities. Lean learning adopts that thought process to precisely target learning opportunities within processes and use available resources to improve operational performance.

Lean learning, unto itself, is conceptual and delivers the most impact when integrated within a lean culture. Although it is possible to develop a lean learning approach without lean thinking, it will diminish how stakeholders perceive your overall effort.

Lean learning complements the kaizen methodology, which is fundamentally about continuous

improvement and root-cause analysis. It is what L&D professionals embed early in their learning design processes, such as within a needs analysis or when designing instructional elements.

Learning within a lean environment is meant to be iterative, documenting and sharing lessons learned to ensure that the issue doesn't occur again while demonstrating learning's role in continuous improvement. Iteration toward perfection is key, so going lean presents the opportunity to seek out new areas and processes to improve.

Naturally, it is impossible to replicate lean learning environments across organizations or even within operational processes; lean learning must adapt for each organization's purpose, strategy, and intent. To ensure lean learning demonstrates strategic and operational value, it is essential to discover learning opportunities within lean environments and apply lean thinking to learning initiatives.

### **Discover opportunities and map lean learning for performance**

L&D departments often are a support function within HR. In that context, L&D practitioners, instinctively or conditioned, respond to organizational learning needs from operations. But rather than reacting to operational training requests, essentially being order takers, lean learning practitioners must seek out improvement opportunities and partner with operations clients. The result is an integrative lean approach that fully incorporates learning within operational processes.

Lean organizations see learning as an integrated value-added role, and lean learning practitioners add performance value by understanding their organizations' operational processes, or what stakeholders refer to as the value chain. The value chain illustrates primary operational activities that deliver products or services. Secondary activities, such as L&D, support and enhance primary activities.

Through deliberate practice, lean learning practitioners deconstruct and identify with specificity the activities requiring performance improvement. Subsequently, they work closely with identified operational stakeholders to learn about their performance expectations and engage stakeholders and employees into conversations to target specific work processes. Knowing

where to focus their efforts, lean learning practitioners conduct targeted needs assessments that highlight precise areas requiring a training solution and skills development. Some refer to that approach as internal performance consulting, where L&D practitioners work with, rather than wait for, stakeholders to address specific needs.

### Business effectiveness

Applying lean to learning design and development efforts requires L&D professionals to always incorporate and adapt lean concepts into their learning approaches and strategies. Do so using the T.R.A.In.E.R.S acronym:

**Timely learning.** Employees must be able to access the most knowledge and learning when they need it. It is about when and where they require learning.

**Relevant learning.** Relevance is delicate, because L&D practitioners believe everything they produce is relevant—but it isn't. Relevance within a lean approach delivers the most valuable knowledge, targeting immediate concerns.

**Agility/adaptiveness.** L&D professionals tend to see their solutions as unique events. Rather than producing the next initiative, consider repurposing existing ones. Things change fast, so learning solutions should be adaptable to address new realities when needed.

**Integrative learning.** Lean leaders see learning as an in-operational activity, not an after-the-fact occurrence. They also expect integrative learning to limit workflow disruption. Find ways to integrate learning within the workflow or capitalize on down time.

**Efficiency.** Minimize the time, effort, and money needed to produce a desired learning outcome. Efficiency is not about shorter learning solutions; it is about making the best use of available resources to create effective learning experiences within existing operational processes.

**Resourcefulness.** Before convincing stakeholders to purchase the latest learning technology, consider what you already have in place. Use those resources while extracting the most value from what they have to offer.

**Seamless learning.** Learning technologies enable the L&D function to blend learning into the workflow as well as across various methodologies and platforms. Embed learning within tasks and workflow in such a way that employees don't recognize they are learning.

### Five-step lean learning process

Adapted from Womack and Jones' *Lean Thinking*, the lean thinking five-step cycle demonstrates a focus on value and seamless and systematic iteration for continuous improvement. Understanding how to layer learning con-

Rather than producing  
the next initiative,  
consider **repurposing**  
**existing ones.**

cepts within the lean cycle is fundamental to making learning a strategic and operational business driver.

Lean learning begins with the organization's strategy, which L&D practitioners will recognize as Kirkpatrick Level 4 (business impact). Your starting point is having a holistic respect for strategy and knowing where to focus learning to have a positive impact (see Figure 1).

**Step 1: Identify and isolate substantive value.** Lean leaders seek out issues that impede operational activities from attaining performance expectations. Identify such issues by continuously asking *why* to determine the root cause. Some L&D professionals fail to acknowledge this first step and end up developing learning solutions that address superficial business issues rather than the root cause.

**Step 2: Map performance connections from the business issue to interdependent operational activities.** Referred to as strategy mapping, the objective here is to become a performance investigator who recognizes the cause-and-effect relationships—or interdependencies—a learning initiative will have on other operational activities. Again, some L&D practitioners tend to address the issue at hand without acknowledging the impact on other operational activities.

**Step 3: Create flow.** This step is about implementing and continually iterating the learning effort. Define resource requirements and apply lean to learning efforts, or apply T.R.A.In.E.R.S. L&D practitioners often get excited about incorporating the latest and greatest tools and technology without first taking inventory of existing resources, repurposing them, and then filling resource gaps.

**Step 4: Establish pull.** Pull speaks to determining the most unobtrusive approach to deploy learning to employees and purposefully ensuring employee engagement. Rather than forcing training onto employees, employees should be pulling—or engaging—willingly.

**Step 5: Seek perfection.** Lean is about iterative improvements, which means that learning is never one and done. Iterative improvement requires fully resolving the issue, learning why the issue occurred



and lessons for it not to occur again, and learning to adapt to the new reality.

At this point, you get to do what you do best: Develop and apply a learning solution. After identifying the business issue and defining the expected value, conduct a needs assessment to determine skills gaps (see Figure 2). Partnering with the operational stakeholder helps to identify predominant skill requirements, drives value within precise operational process areas, and contributes to engagement.

Step 2 at the operational level is designing and developing a learning solution that aligns with the organization's strategic objective or mission and operational expectations. Every learning effort is unique, and you must design it to address the business need.

Learning delivery and deployment occur next. Be forward looking and consider designing the solution based on how it will integrate with the workflow, will adapt to changing requirements, and can be deployed and accessed in a timely manner.

The fourth step is about employee engagement and measured improvement. Success here speaks to the time and diligence taken in the previous two steps. When the L&D function properly implements a learning effort,

users will want to engage, which helps meet Kirkpatrick Level 3 (behavior). Learning should occur without significantly impeding workflow and operational processes.

Finally, take stock of the learning initiative's performance and address the iterative improvement need.

- Did it address the established business issue?
- How can the solution improve?
- What remains relevant?
- How can you adapt the solution moving forward?
- How can you make the learning leaner?

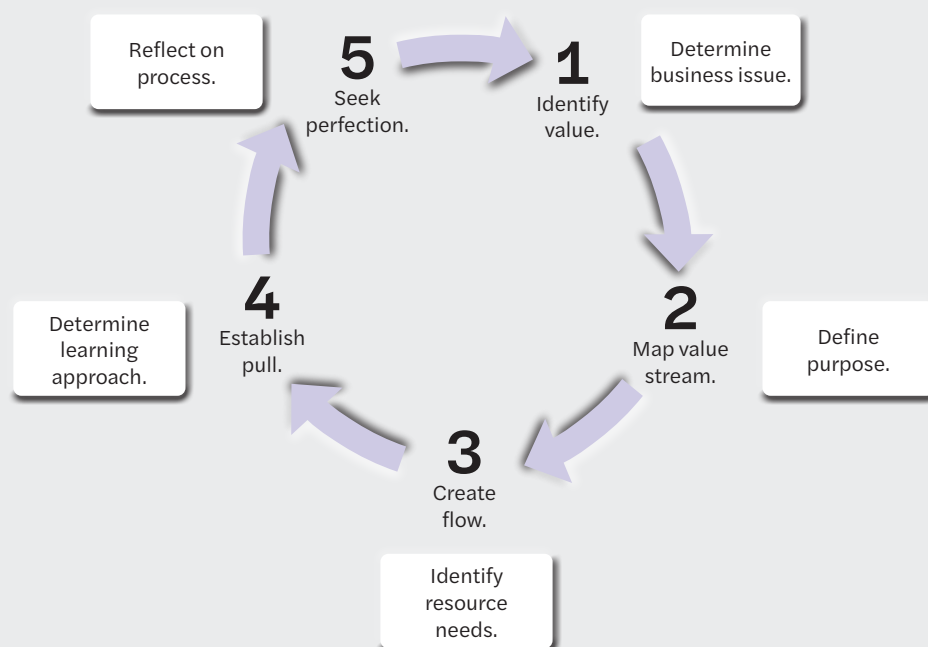
## Real-life lean learning

You may be questioning how realistic it is to fully implement a lean learning methodology. Note that many recognized organizations fully apply lean methodology and lean learning.

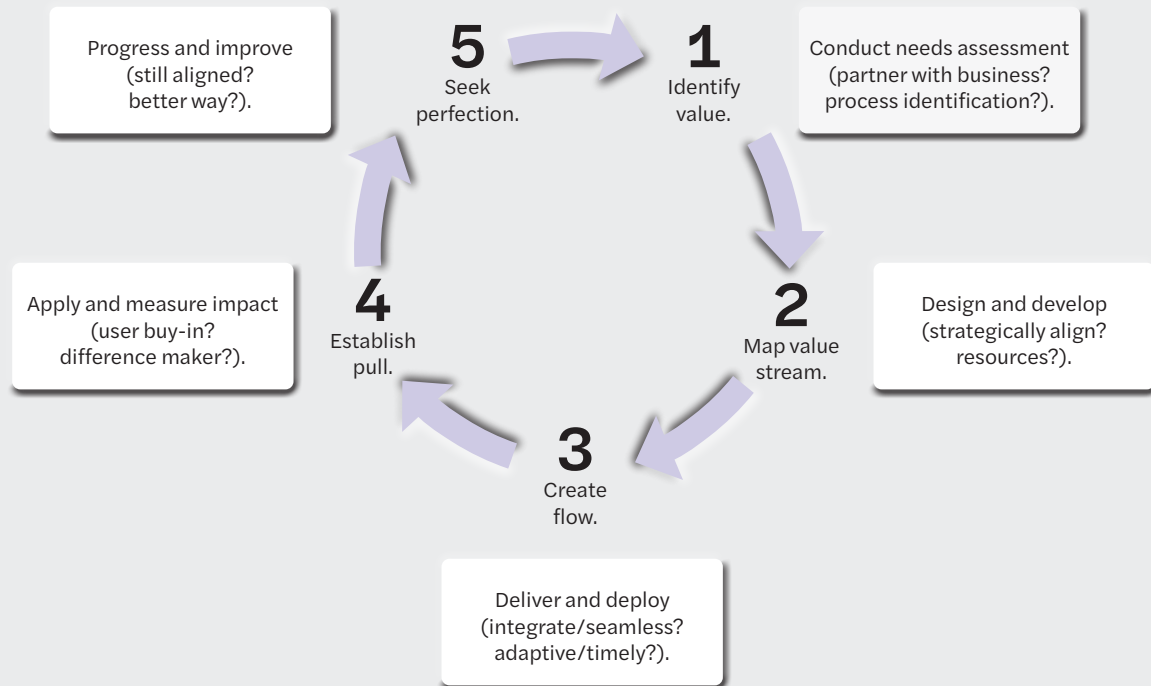
Consider Toyota, the granddaddy of the lean movement. More than 50 years ago, the company recognized it could never directly compete with the three dominant US car manufacturers at their own game. In response, it sought to learn about what customers expected from a car and assess its competitors' weaknesses.

Toyota went straight after the poor quality, efficiency, and safety aspects customers were forced to accept from

**Figure 1. Lean Thinking Five-Step Cycle at the Strategy Level**



**Figure 2. Lean Thinking Five-Step Cycle at the Operational Level**



the competitors. The company applied kaizen to root out why those elements were relevant to customers and subsequently identified the value drivers within its process that would address those needs. Finally, Toyota's manufacturing evolved to enable line workers to stop production to correct an issue, something unheard of in the industry.

From that came learning. Stakeholders tasked the learning function to play an integrative and seamless role to directly interact with operational processes, which led to continuous, iterative improvements. Today, Toyota remains the industry standard for reliable, efficient, and quality cars.

Toyota is not the only example. Examine what makes Starbucks unique. Reflect on when you order coffee there—within a few minutes, your drink is completed exactly as you like it every single time. Next, consider the consistency of your order each time you visit a different location anywhere in the world. That is how well the Starbucks L&D team integrates learning—so baristas possess the skills and knowledge they require to satisfy customers every time.

### **Align and integrate**

Leaders are under tremendous pressure to meet evolving performance expectations using what they have while doing it faster and better. The challenges leaders face are opportunities that L&D professionals can use to their advantage.

L&D has everything it needs to fulfill this strategic and operational calling to align and integrate well with the lean learning methodology. The reconceptualization of learning's role toward lean thinking offers you an indispensable role that company leadership expects you to fulfill—whether or not leaders realize it. This is the chance for L&D professionals to genuinely capitalize on the lean thinking methodology.

**Ajay M. Pangarkar** and **Teresa Kirkwood** are founders of CentralKnowledge.com and LearningSourceOnline.com and authors of *The Trainer's Balanced Scorecard: A Complete Resource for Linking Learning to Organizational Strategy*; [ajayp@centralknowledge.com](mailto:ajayp@centralknowledge.com) and [teresak@centralknowledge.com](mailto:teresak@centralknowledge.com).

# GO

BY BOB COLLINS

Microcredentials show employers  
you have the skills they seek.





MICRO



**Y**ou found the perfect job—it is the company you’ve always wanted to work for and is work that ignites your passion. The opportunity for career and personal growth are tremendous. And then you see it, the potential deal breaker: an important required skill that you don’t have, one that you have never had to use in previous jobs, a skill for which you have no training. What can you do? How can you show this potential employer that you are the perfect candidate?

#### Microcredentials.

During the past decade, the term *micro* has disrupted a variety of fields; you may have heard such terms as microfinancing, microapartments, and microinsurance. In the job market, there are now microjobs and microassignments; in entrepreneurship, there’s microconsignment.

It’s now education’s turn. You are undoubtedly familiar with microlearning—relatively small learning units and short-term learning activities offered electronically, on demand, and as needed on the job. Many schools, companies, and associations are now offering microcredentials.

Microcredentials are the answer to how you show prospective employers you have skills they’re looking for. In fact, microcredentials are increasing in popularity among employees and HR departments. The Online School Center reports that “In a recent survey of human resource managers across different industries, 95% were interested in the micro-credentials of potential hires.”

But don’t wait until you find the perfect job that you don’t qualify for to start building new skills.

#### What are they?

Microcredentials are a competency-based and skill-focused form of credential that demonstrates skills, knowledge, and experience in a given subject area or capability. Microcredentials are sometimes referred to as digital badges, web badges, open badges, nano degrees, mini degrees, or microcertifications. However, microcredentials and digital badges are not necessarily synonymous.

Microcredentials verify a person’s knowledge or skills based on their successful completion of a course, activity, assignment, project, portfolio, or practical assessments. Meanwhile, digital badges are electronically displayed icons that contain metadata that provides information

about the earned microcredential. You can have a microcredential without a digital badge.

If you have earned a degree or two, you know the value they can bring—but you also know the expense and the amount of time it takes to earn a degree. I’m sure you have heard of, and perhaps have, a professional certification, which is a credentialing process whereby a third party with authoritative power establishes qualifications that assess a professional’s ability to meet predetermined and standardized criteria. Professional certifications cover an extensive body of knowledge and a related series of associated competencies. Microcredentials are more focused on specific skills than professional certifications and usually are faster to complete.

Consider, for example, Deb Hansford. For more than 20 years, she has been facilitating technical courses to manufacturing and supply chain employees for several large, well-known companies, teaching extensively both face-to-face and online. Over the years, she became adept at determining a company’s needs and selecting or designing the courses that will meet them.

A few years ago, Hansford took a short certificate course on gamification and immediately realized how she could start using those principles in her training. She began putting them into effect in both her face-to-face and online classes and discovered that participation and engagement in her online classes more than doubled, her students in both types of courses loved coming to her classes, and companies were thrilled with the results. Hansford’s enthusiasm was evident when she told me, “It was this microcredential course that gave me a tool I’ve used so successfully to take my training to a new level.”

As professionals, we are becoming increasingly responsible for our own development; microcre-

dentials offer a more personalized, self-directed learning experience, with the ability to tailor clusters of microcredentials to fit our own career goals and responsibilities. When coupled with digital badging, they are a quicker, easier way to show to our employers or potential employers what we know.

Some organizations and universities are creating microcredentials that can be stacked—that is grouping or aggregating multiple microcredentials that can be built into a larger, more recognizable award. Think of stacked microcredentials as LEGO bricks. You can stack microcredentials in such a way that one skill builds on another, or you could earn credentials in related fields that, taken together, prepare you for a specific kind of job. In addition, you could add a microcredential within an area of expertise to an existing two- or four-year degree. That is becoming common for K–12 teachers and for some medical professionals.

Several of the popular massive open online course (MOOC) providers are working with universities to create microcredentials that could be accepted in place of an admissions requirement like the GRE or can count as partial credit toward a degree at the institution. For example, I have a friend who completed the MITx Supply Chain Management MicroMasters program. The stackable online MITx microcredential courses gave him the opportunity to apply to one of 22 universities in 10 different countries, including the Massachusetts Institute of Technology itself, which will accept the MicroMasters credential as partial credit toward a full master's degree. My friend decided to complete his master's degree in supply chain management through MIT. The ability to start a flexible program at a lower cost, incrementally over time, gave him the incentive he needed to get started and pursue and complete the degree program.

### **WIIFM for talent development professionals**

What skills do you want to highlight in your personal skills profile as a talent development professional? Are there skills you need

that a microcredential would highlight for you in your personnel record or on your resume? Relevant skills for talent development professionals may include data analytics, change management, needs assessment, e-learning instructional design, knowledge management, or a specific technology such as Adobe Captivate or Articulate Storyline.

Monica Guzman, a journalist specializing in technology for the *Seattle Times*, wrote, “If resumes are a bunch of claims, badges are a bunch of evidence.” Badge metadata makes the evidence underpinning your claims visible to everyone.

Understanding your employer's needs is always the place to start when considering additional job training. Conduct your own personal skills gap analysis. What skills does your employer need for an excellent employee in your position? What skills do you currently have? Is there a gap?

That is the place to focus your time and effort, pursuing the skills that can improve your performance or help your company strategically. Employers care more about competency than knowledge, so focus your learning where it is needed most.

### **Getting support from your HR department**

When making the argument to your employer about pursuing microcredentials, consider these factors:

- The microcredential can help fill specialized skills gaps that traditional credentials may not address, especially in the timeframe or in the depth that you and your employer need.
- Typically, microcredential education is relatively inexpensive and takes less time to earn when compared to most certification and degree programs.

**Microcredentials offer a more personalized, self-directed learning experience.**



- Supporting this kind of credential can help your employer leverage its existing workforce more effectively by ensuring employees' skills are up to date.
- Offering the benefit can make your organization a more attractive employer to other job seekers and enable it to attract talent.

Will your company pay for training that will lead to a microcredential? Start by investigating your company's policy regarding support for continuing education. What is the process for requesting additional training? What will it reimburse? As talent development professionals know well, when communicating your request, the training must show value to the company. Employers aren't looking for a particular microcredential; their focus will be on the skills and competencies you will learn.

Many organizations offer microcredentialing, but they are not all equal. Universities, colleges,

and associations have the best reputations. MOOCs that have agreements with universities offer well-respected microcredentials. In addition, some technology companies—such as IBM, Microsoft, and HP—offer microcredentials or badges for their training on how to use their technology.

### **Making moves**

If you are considering a job change, what skills or knowledge will you need for the position you want? Microcredentials show competency in skills that may not have been part of your previous jobs. Companies are looking for experience, and some will accept a microcredential in lieu of on-the-job experience.

Microcredentials can be a better way for recruiters to identify candidates who clearly demonstrate specific competencies, so target microcredentials for skills that are important to prospective



employers. Jobs are made up of skills. That's why companies don't hire for a job; they hire for skills.

### **Be aware**

Even though microcredentials have become quite popular, there are some potential shortcomings. The first is the lack of consistency between the various microcredential programs. The minimum amount of time required to complete a microcredential, the level of effort it will take, and the proof of competency can vary considerably among providers—and even within different programs from a single provider.

Microcredentials are not accredited, recognized, or evaluated by third-party organizations, except those that are part of a university degree program. Such variability and lack of standardization make it difficult for consumers to compare the various microcredentials. While all employers understand that a master's degree signifies a higher level of preparation than a bachelor's degree, it is impossible to say whether a Coursera specialization prepares a person more or better than an edX professional certificate or an Udacity nanodegree.

The second potential shortcoming is pursuing a microcredential when a certification or degree program would better meet your career goals. It never pays to substitute the better with the good. Give careful thought to the type of education or training you need for your career goals. Don't settle for the least expensive or the quickest option if it won't really take you where you want to go.

Even with those caveats, if you need specific competencies and skills and want to demonstrate mastery of them, microcredentials can be the opportunity you are looking for.

### **Self-promote your achievement**

After earning a microcredential, don't hide your light under a basket. These are new skills for you, so share information about them with the people who matter at your company—including your manager and the HR department. More

importantly, find ways to use those new skills. If you can put new skills that you've learned into practice on the job, your supervisor is more likely to give you the opportunity to get more continuing education.

Also, share your accomplishments and digital badges on social media, display them on online resumes and job networks, post them to your LinkedIn account, add them to your email signature, and list them on your website. Digital badges contain data about the credential, who issued it, and what you had to do to earn it; those details help an employer see the value of the underlying microcredential. Finally, add your microcredentials to the Certifications or Continuing Education section of your resume.

### **Don't get left behind**

Increasing globalization, rapidly evolving technologies, and digital disruptions of major industries and professions are affecting everyone. If professionals do not engage in lifelong learning, they will soon be left behind. Employees need to continually keep their skills sharp and up to date to have an edge in their careers. Microcredentials can provide the personalized, self-directed, on-demand, job-skill-focused training that you need to thrive in the evolving workplace.

An associate of mine is fond of asking: "When is the best time to plant a tree?" His answer: "Twenty years ago or today." So, let me ask you: When is the best time for you to upgrade and demonstrate your skills?

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**Many organizations offer microcredentialing, but they are not all equal.**

# SIMULATION as a Lever for CHANGE



Use immersive exercises  
to advance your change  
management initiatives.

BY GRETCHEN KOLB





# A YOUNG MAN WITH OPIOID USE DISORDER

checks himself into a local hospital-based crisis response center for treatment. During the intake process, staff find him unresponsive and pulseless in the restroom. Staff quickly initiate CPR, administer Narcan, and transport the revived patient to the emergency department, where a handoff occurs.

While that all-too-familiar scene is one that may happen at any location, in this case it is a simulation, with a high-fidelity manikin playing the role of the patient. It is similar to one of several that Penn Medicine implemented to prepare for the relocation of its crisis response center (a psychiatric emergency department) from a freestanding site to one connected to the hospital.

Through such simulations, we were able to engage the crisis response center's interprofessional providers and staff to refine newly developed processes; clarify roles and responsibilities; recommend modifications to the physical space to improve patient and staff safety, such as the addition of a window to see into the triage room; and improve confidence. That experience is one of many in which Penn Medicine harnessed the power of simulation to plan and implement a significant change initiative within our health system.

## Successful organizational change

In the broadest definition, change management is the process of moving from a current to future state successfully. Regardless of the change model your organization ascribes to, creating a compelling vision of the future state as a means of engaging stakeholders, gathering and analyzing feedback about the future state, addressing concerns, and ongoing refinement are all key components.

Examples of successful organizational change in healthcare include establishing a new clinical care facility, team, and process, as we faced with the crisis response center, as well as introducing a new technology or program. Penn Medicine has used simulation to support successful large- and small-scale organizational change—and your organization can too. Collaboration between your organization's change management and simulation teams is mutually beneficial, improving project outcomes and visibility for both.

## Simulation defined

Simulation is an innovative way to educate and assess technical competency through immersive experiential learning. Simulation can involve the use of trained actors, known as standardized participants (SPs), to improve communication skills by realistically portraying patients, their family, or healthcare team members.

It can refer to the use of high- to low-fidelity task trainers to teach technical skill such as ultrasound-guided central line placement or virtual reality trainers to teach skills such as how to perform a colonoscopy. Likewise, simulation can refer to the use of high-tech patient manikins controlled remotely via software and made to speak, produce vital signs, and respond physiologically to simulated medications and defibrillators to reinforce interprofessional teamwork, collaborative practice, and critical thinking.

An essential part of any simulation is the post-exercise debrief in which learners reflect on actions and identify areas of strength and opportunities for improvement for themselves as well as the system. David Kolb, founder of the modern theory of experiential learning, describes the importance of a reflection process in defining experiential learning.

## In practice

Simulation at Penn Medicine trains more than 12,000 clinical providers, nonclinical staff, and students annually from Penn Medicine's ambulatory practices, specialty care facilities, six hospitals, and the Perelman School of Medicine. The simulation program is within the umbrella of the Penn Medicine Academy, the centralized organization development and learning function for our system of more than 40,000 employees.

PMA monitors and promotes improvements to the patient and employee experience, oversees systemwide classroom and online training, partic-

ipates in strategic workforce planning, supports talent and leadership development, and provides consultation services for large-scale system-based change management.

The types of large-scale change projects PMA supports are diverse. In addition to designing and activating a new facility and team to combat Ebola virus disease, the academy has supported the transition of a level 1 trauma unit from one hospital to another and the design of a new healthcare inpatient facility, with simulation playing a crucial role in each of those efforts.

Through those experiences, we have learned that the successful use of simulation for change management is about the strategy, not the simulator. Success requires effectively using simulation to create the future state, through both high- and low-fidelity techniques, enabling individual stakeholders or teams to physically interact with this vision to rehearse, test, adjust, and refine it prior to launch.

### **First Five Minutes program**

Our most widely disseminated simulation activity for change management is a program we refer to as the First Five Minutes. We have delivered the program to more than 25 ambulatory practices to enable staff to provide medical and crisis resource management prior to the arrival of paramedics in the event of a sudden onset patient clinical emergency, such as a cardiac event.

These are often ambulatory practices that are relocating to a new space with a new clinical emergency response process and policy.

Like many healthcare organizations, the patients we manage in the outpatient setting have increasingly complex health issues. Thus, prior to opening a new space, it is essential for all staff to recognize and respond to a patient emergency quickly and confidently in alignment with practice policy.

This simulation's planning and delivery requires close collaboration with the simulation team and the practice's leadership team to develop a realistic patient scenario, ensure representative staff participation, and address any findings. The teams alerted staff to the simulation in advance and asked employees to act as they normally would in alignment with their practice's emergency response policy.

During the simulation, an SP patient, accompanied by an SP family member, reports chest pain once staff place him in an exam room. Staff members then simulate contacting 911, mobilize the automated external defibrillator and medical supplies, and initiate CPR and any other medical care on a patient manikin substituted for the SP. The simulation ends with the arrival of SP paramedics.

The simulation educator debriefs the event with the practice staff and leadership, enabling them to self-discover team strengths as well as any policy, space, equipment, or knowledge constraints that could interfere with prompt and safe care delivery. In addition, the practice leadership team receives observations from the session and a set of other recommendations, which may include supplementary training or adjustment to the policy or physical space.

## The successful use of simulation for change management is about the strategy, not the simulator.

Participating staff report that they feel better prepared to address clinical emergencies in their facility following the program and have suggested changes to team roles, location of medical supplies, and access to the automated external defibrillator to enhance safety in the practice.

### **Large-scale change initiatives**

Our application of simulation for change management is not limited to implementing a single new policy or process in an ambulatory practice. We have used simulation to engage staff to identify and address a multitude of challenges in advance of a level 1 trauma unit's relocation from one health system hospital to another. This large-scale change project integrated both scenario-based simulations at the simulation center as well as in the newly constructed trauma unit.



Four months prior to opening, interprofessional and interdisciplinary providers from the operating room, emergency department, and intensive care unit (ICU) participated in simulations to prepare them to care for this new patient population. One month prior to opening, many of the standard workflows (for example, the arrival of a patient with a gunshot wound), as well as low-frequency, high-acuity situations (such as the arrival of a pregnant trauma patient with imminent delivery), were simulated in the newly constructed trauma unit. For many staff members, that was their first exposure to the new space, an opportunity to test their readiness and provide feedback on newly developed processes and a crucial step in the change management process.

Upon initiation of those simulations, our process improvement partners identified up to 30 issues per session in need of resolution. To support the sustainment of the learning and changes achieved, the weekly simulations continued with fewer than 10 issues identified per session at the end of six months.

Since the relocation of the trauma unit in 2014, we have applied the best practices learned

from this experience to prepare for the opening of outpatient healthcare facilities such as a comprehensive spine center and an urgent care center. In both cases, staff members were scripted to simulate their anticipated daily workflows, including following the progression of a patient from check-in to provider examination, and the application of technology such as the electronic medical record. These sessions have also been planned in collaboration with our life safety and regulatory teams to effectively meet health department requirements prior to occupancy.

By far the most extensive change management project we have been engaged in to date was the use of simulation to inform the preconstruction design of a \$1.5 billion new acute care facility located on our West Philadelphia campus, which will include 500 inpatient rooms and 47 operating rooms. Penn Medicine used interprofessional workflow simulations in a 40,000-square-foot foam mock-up of a representative inpatient unit to identify opportunities for blueprint modifications.

Of the more than 500 staff members who toured the mock-up, we asked 108 representatives from 17 clinical and nonclinical specialties to participate



in multiple interactive day-in-the-life simulation activities that required interaction between professional roles, such as medical and ICU-based workflows, clinical team rounding, meal and medication delivery, and a patient clinical emergency.

During the simulations, we collected participant data via audio-video footage, direct observations, real-time feedback, large group debriefing sessions, and surveys. The benefit of engaging simulation in this project was clear: Feedback from one-hour tours of the facility by providers and nonclinical staff differed significantly from their feedback following the four-hour simulations. Data from the simulations led to significant facility redesign that would not have been captured based on tour data alone, including alterations to the building footprint, height, and bed capacity.

The mock-up was reconstructed based on the newly informed design, and we continued to gather end-user feedback for additional refinements. That was a key first step in our change management process to engage employees in this transition, enabling them to experience the new facility firsthand and witness the power of their feedback. Participants recognized the uniqueness of this experience; one unit secretary noted, “It was refreshing to see the changes that were made as part of our collective input.” Another advanced practice provider found the experience “very validating” and that “it is evident that all feedback was listened to attentively.”

## Best practices

Here is some guidance on using simulation as part of your organization’s change management process.

**Focus on the strategy, not the simulator.** What if you don’t have the available space or budget to build a large-scale reproduction of a new facility or a high-fidelity manikin to simulate the First Five Minutes? You can apply the same principles of engaging stakeholders in a dynamic design process on a smaller, less expensive scale in the planning of an individual inpatient or procedure room using masking tape, cardboard boxes, room dividers, and props to reproduce the room parameters and its contents.

Similarly, you can accomplish simulating infrequent and high-risk events in a clinical space by using an inexpensive CPR manikin. We have also participated in tabletop simulations with stakeholders around facility design, workflows, and processes to seek their engagement and input without the aid of any high-fidelity technology.

**Leverage existing internal resources.** Take advantage of the resources that exist within your organization. If you are an OD or change management consultant, partner with your organization’s simulation team to achieve even greater success for your initiatives through simulation.

If you are a simulationist, partner with your OD colleagues to gain exposure to large-scale strategic projects and increase your leadership visibility and support. Take advantage of the opportunity to improve your consultation skills—realize the benefits of developing a scope of work, identifying an executive sponsor, and resolving system issues.

**Anticipate construction delays.** If you are conducting simulations in a newly constructed facility, expect the impact of construction delays. For us, that has been a consistent challenge, which has limited our access to the space and the integration of technology or equipment. We have learned the importance of anticipating delays, having an alternative simulation location or date, and limiting on-site workflow simulations to a subset of stakeholders.

**Just try it.** The first change project you support through simulation doesn’t need to be the design of a new healthcare facility or mobilizing the organization to face a highly infectious disease. It is OK to start small—just start somewhere.

## Achieving the future state

The next step for our simulation team is to support the training and education change efforts to prepare about 12,000 clinical and nonclinical staff to provide safe patient care in the new acute care hospital whose design we influenced through simulation. While we are still refining the strategy to accomplish that, we will apply the lessons learned from other change projects, such as the trauma center relocation, to leverage simulation to plan, implement, and sustain a successful transition.

Simulation is a powerful experiential solution that organizations can use to invite end-user engagement and feedback about barriers to the future state, before it is achieved. Simulation has advanced many of our organization’s large-scale change projects, and it can do the same for yours, escalating the outcomes for both your simulation and change management teams.

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# Tech Poised to Transform Workplace Culture and Training

BY DERRICK THOMPSON

**E**xpect corporate learning to be refashioned as corporations roll out training programs to meet the evolving workforce's shifting needs, experts say. From the front line to the C-suite, most—if not all—of the workforce will require training to acclimate to the new way the world works, with special attention paid to remote work life.

Prior to the onset of COVID-19, Udey researchers surveyed L&D leaders on workplace learning and found that attitudes are changing toward artificial intelligence (AI), virtual reality (VR), and other emerging technologies. Those survey findings indicate that such technology will have a more prominent role in training moving forward.

Tammy Bjelland, founding CEO of Workplaceless, a remote work education provider; Tacy M. Byham, CEO of DDI, a leadership consulting firm; and Don Spear, CEO of OpenSesame, a global e-learning provider, agree that the way the world works has forever changed, and as corporate learning ecosystems across the world undergo extreme makeovers, business leaders predict that an accelerated adoption of emerging technologies is all too certain.

## Learning assessment

Determining the learning needs of a workforce that includes employees new to remote work must be comprehensive. Not only will staff need training, so will leaders—and lest we forget, who will train the trainer? Spear expects training to rise to the top of most talent development experts' lists as an area experiencing a permanent shift, suggesting technology-fueled learning opportunities as a solution to help maintain employee engagement and productivity.

"Training, and particularly e-learning, becomes even more critical to employee engagement and development for virtual workplaces," says Spear. "Digital

learning on effective time and priority management, prioritization, and project planning can help employees develop habits that set them up for success working from home."

To do that, many talent development professionals may find themselves revisiting foundational basics that account for an organization's culture—such as mission, vision, and values—ensuring that employees can access information regardless of their location. Also, learning opportunities for leaders who are managing remotely for the first time, for example, will become more prevalent. One pitfall to avoid during transitory times like these, Bjelland shares, is to think that making resources accessible online is all that needs to be done.

"Simply attempting to replicate your in-office organizational culture for a virtual workplace will prove to be ineffective," Bjelland explains. "There are shifts in interactions, communication, and collaborations that will affect and define your new culture. It's an important first step to diagnose both the goals and gaps specific to your organization."

Identifying gaps in workforce skills is what Udey's 2020 *Workplace Learning Trends Report: The Skills of the Future* calls skills mapping—or making a visual representation of skills needed to perform desired roles as compared to the existing skill base. "Expect organizations to take a deeper dive into skills mapping to prepare their workforces for what's next," the report notes. Whether establishing or reshaping workplace culture, leaders should not overlook soft skills training.

"Remote workplaces require leaders to tap into some of their most basic soft skills," Byham states. "Leaders need to address individuals on a one-on-one basis and help them deal with challenges. They need to use empathy to address their fears and concerns."

Focusing on leaders' training needs, Byham asserts, will ultimately increase employee engagement and personal investment into the organization.

## Learning technologies

There once was a time when many organizations played it safe and hesitated to experiment with chatbots or AI, but the sudden global changes have necessitated businesses to embrace technology—especially e-learning—at an accelerated rate. Udemy researchers say that in 2020, L&D professionals will find themselves reshaping the learning ecosystem to optimize workplace training experiences.

AI, augmented reality, chatbots, and VR are some of the technologies that are getting a closer look for application in corporate training. According to 2020 *Workplace Learning Trends Report*, 26 percent of organizations are planning for future use of AI, compared with only 5 percent that use it. Sure, just about one-quarter of organizations plan to use AI, but that indicates a significant attitudinal change.

The report notes that reshaping the learning ecosystem will involve applying adaptive AI and personalization to learning as well as tailored learning paths. As much of the working world pursues a path of transformation geared toward a growing remote workforce, experts foresee that increased adoption of emerging technologies, including AI, will create new opportunities for talent development.

“Innovations in technology open up so many doors to answering these challenges and supporting remote professionals,” says Bjelland. “From virtual reality to gamification to social learning—technology that enables and augments the ability to connect with resources and other people will accelerate not only learning in the remote workplace, but also career growth.”

Leaders at DDI and OpenSesame say they have seen exponential increases in the demand for the e-learning courses and virtual training opportunities that their organizations offer. “COVID-19 reinforced what we already knew: E-learning is the best option for organizations to quickly and scalably develop their workforces,” Spear states. With technology taking a more prevalent role in workplace training, Byham reminds learning leaders that the responsibility to foster connection and interaction among employees

in virtual spaces will continue to rely heavily on human intention and ingenuity.

“Virtual classrooms aren’t just webinars or self-paced online learning. They are interactive digital spaces led by an instructor,” Byham explains. “Our experience tells us virtual classrooms need interactive learning environments with features like whiteboards and small breakout rooms for group discussions and practice.” When done right, asserts Byham, virtual classrooms can deliver all the human connection and interactivity that people crave.

## Learning reimaged

While the go-forward training needs will vary from organization to organization, experts agree that the workplace will likely never return to the way it was. Bjelland highlights that it’s important to pay attention to new ancillary challenges the virtual workplace presents, such as worker burnout, isolation, and the natural inclination to revert to in-office metrics. However, she cautions business leaders not to overlook new possibilities, such as access to wider talent pools and achieving higher employee retention rates due to increased job flexibility and satisfaction.

New and innovative uses for learning technologies will give the talent development function an opportunity to enhance and bolster its value during this transition. Providing dynamic, tech-fueled training programs can yield positive business outcomes, including increased engagement, connection, and productivity. And as more business leaders discover that learning technologies are effective for building employees’ skill sets as well as instrumental in establishing culture in the virtual workplace, those leaders may have to loosen their purse strings to remain on the cutting edge of talent development.

For example, Spear says OpenSesame believes lifelong learning is essential to a productive workforce. For leaders who share that sentiment, the question is not “Can your organization afford to invest in learning technology right now?” but “Can you afford not to?” Increasing the budget for learning and technology may seem like an optional expense, but as Spear counsels, investments in your people will always pay off.

**Derrick Thompson** is a writer/editor for ATD; [dthompson@td.org](mailto:dthompson@td.org).



# Use Feedback to Your Advantage

Strategically approach performance conversations for career advancement.

BY AMANDA HADDAWAY

**Y**ou open your email to find a reminder that your performance review is coming due again.

You're feeling less than excited because you've previously struggled with moving beyond the discussion and putting your manager's feedback into action. Make this year different by being ready to take actionable steps to improve your career based on that feedback.

Feedback really is a gift when it's used appropriately. To get the most out of the performance review and improve your personal growth and development, I recommend a four-step process: look back, think ahead, prepare, and plan.

## Take a look back

Whether your employer requires monthly, quarterly, biannual, or annual reviews, you'll want to take time prior to the conversation to look back at the previous performance period. Think about what you've accomplished. What were your wins during the past few months? What goals did you achieve? Were there projects out of your usual scope or purview that you completed during the time period? What about those projects added value to the team or the organization as a whole?

Some employees have a hard time recognizing their own contributions, sensing that it'll come across as bragging about their work. But this is your opportunity to shine in front of your reviewer. Consider keeping a kudos file, where you store information about your goals and achievements, to help remind you about the projects you completed or when you were acknowledged for having done a great job.

If you're really struggling to come up with accomplishments on your own, talk to your teammates and ask them if they can provide examples where you helped them out or situations where they believe you went above and beyond. Be creative in your thinking. Perhaps there was a situation where you stepped outside your normal talent development role and assisted someone in a different team or business area. Maybe you helped

4

## Steps to Set Performance Goals for a Role You Want

1

Look back: What have been your major wins during the past performance period? What went well? What are you most proud of?

2

Think ahead: Share with your manager why you want to move into a new role and how you'll get there.

solve a problem through a collaborative brainstorming session with a colleague.

### Think ahead

Some part of the performance conversation with your reviewer should focus on what's ahead. This is a great opportunity to discuss professional development opportunities as well as goal planning with your manager.

If you're unclear about the big priorities for your team or your overall organization, ask your manager what she sees as the most pressing issues for the upcoming performance period. Employees who clearly understand how their roles align with the organization's mission, vision, values, and goals tend to be more engaged and productive than those who don't see that big picture.

If there's something that would help you learn new skills or enhance existing ones—such as training, conferences, and other learning events—be sure to advocate for yourself during the conversation. As you're well aware, most employers have a finite amount of training dollars. So, sometimes it's those who ask who are more likely to be the beneficiary of future training opportunities.

Also think about developmental assignments and cross-functional opportunities that could broaden your skill set. Broadening or deepening your skills in a particular area could come in handy in the future and also make you more valuable to the organization.

## Take that constructive feedback and turn it into goals for the next performance period.

Those who are intellectually curious often benefit by exploring stretch assignments and other ways to get involved in cross-functional projects. That's another great method to develop additional skills and competencies outside the normal L&D realm.

Shadowing opportunities are another development option to consider. Perhaps a colleague has mastered a skill that you would like to learn. Your co-worker may be willing to walk you through their process to help you learn more about the topic. These types of learning don't need to cost your team or employer anything other than time.

### Prepare

Before receiving feedback, mentally prepare for the conversation and enter it with an open mind. Be prepared for both positive and



## Common Performance Review Types

In addition to the variance in the frequency of performance reviews, organizations use different types to measure employee contributions.

**Self-assessment and manager assessment.** Both the employee and the manager complete an assessment. The parties come together to review their responses and discuss any areas where the two parties may disagree.

**360-degree review.** The employee's manager, peers, and direct reports offer feedback to give a complete picture of the employee's performance. This model works best for employees who manage larger teams, so that feedback can't be attributed to one specific individual.

**Management by objectives and goal-setting performance systems.** The focus here is to set goals for the next performance period. This style of review works best with employees who already know how to do their jobs and are experiencing high levels of performance.

3

Prepare: Mentally prepare to receive the feedback. Being open to hearing another person's perspective enables you to listen and retain better.

4

Plan: What tools and resources do you need for the new role? What assistance do you require from your manager? What will success look like?

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constructive feedback during the discussion with your reviewer. Although it's great to hear affirming accolades about your work, the constructive messaging also helps you grow more as a professional. Take that constructive feedback and turn it into goals for the next performance period.

Listening is a tough skill to master. Because the performance conversation will likely be less than an hour, ensure you're making as much out of it as possible. Taking notes of the discussion will help you retain the information the reviewer presents. Then use your notes to help develop an action plan (the next step).

Keep in mind that performance reviews are a two-way conversation, so feel comfortable responding to your manager's feedback. If you're not getting the support you need to be effective in your role, talk to your reviewer about what resources and opportunities may be available to you going forward.

It's also important to be conscious of your body language and facial expressions, particularly if you're receiving information that you don't agree with or that you find to be untrue. Try to remain as open as possible and refrain from becoming overly confrontational. It's OK if you disagree with the feedback, but you still need to be respectful in your response. Try to understand the reviewer's perspective and start thinking about small shifts you could make to improve performance in the future.

Ask questions if you're unsure about any of the feedback you've received. This is your time to get clarification. One helpful method is to ask your manager for specific examples of the behavior or situation that's being described. If you think you understand what your manager is trying to articulate, use reflective listening skills to paraphrase it back and confirm mutual understanding.



### Using action planning

People often forget much of what they hear shortly after an initial conversation. To combat the forgetting curve, think of ways to reflect on the feedback you've received and implement it. Consider using the start-stop-continue approach commonly used in training courses:

- What are you going to start doing as a result of the feedback?
- What are you going to stop doing as a result of the performance conversation?
- What are you going to continue doing as a result of the discussion?

For each cited strength, think about how you will continue with that level of performance. Just because you were recognized once doesn't mean it's time to slack off in that area. How can you continue to improve with that competency?

For areas that were listed as developmental opportunities, identify the concrete action steps you can take for improved performance going forward. Change can sometimes feel overwhelming, so break larger goals into more manageable chunks. Commit to actionable steps that you can take this week, next week, later this month, next month, and so on. Breaking down tasks into smaller components creates a quicker sense of accomplishment, and you'll be more likely to stick with the larger plan.

As a bonus last step, consider following up with your reviewer before your next review is due. A quick check-in could be helpful in assessing the progress you've made and whether you're on the right track to even better performance. Find out from your manager how she likes to communicate. It may make sense to get something regularly scheduled on the calendar.

**Amanda Haddaway** is managing director of HR Answerbox and creator of New Manager Bootcamp; [amanda@hranswerbox.com](mailto:amanda@hranswerbox.com).



# Helping advance employee careers

*The Guthrie Clinic leverages OpenSesame for targeted training program with unique learning paths*

**By Agnes Herba, Sr. Product Marketing Manager at OpenSesame**

**T**he Guthrie Clinic is a non-profit integrated health system located in north-central Pennsylvania and upstate New York, serving patients throughout a 12-county area. Comprised of a research institute, home care and hospice, five hospitals, and a multi-specialty group practice of more than 500 physicians and advanced practice providers, The Guthrie Clinic provides a wide range of services and programs designed to enhance the health and well-being of those it serves.

To maintain its high levels of service and quality, The Guthrie Clinic invests in the continuing training and education of its workforce of nearly 7,000 employees. OpenSesame is the elearning solution The Guthrie Clinic relies on to efficiently and effectively extend training to its large, distributed workforce.

## Targeted training approach

When Jeff Grenzer joined The Guthrie Clinic as its head of training and organizational development, the company had just implemented a new learning management system (LMS) and had included OpenSesame as its premier content provider. The duo provided a powerful platform to accelerate the organization's elearning initiative, but the project initially lacked the necessary momentum to take hold.

"We had the right idea, but just not quite the right execution," says Grenzer. "OpenSesame was providing more than 5,000 courses to our managers but the elearning program was severely underutilized."

Grenzer decided on a more targeted approach. With input from managers and employees, the organization worked to define its overall learning strategy, outlining distinct learning paths that would simultaneously meet employees' career development goals as well as The Guthrie

Clinic's training and workforce educational goals.

"Next, I worked directly with our customer success manager at OpenSesame to identify the best courses to meet the objectives of each learning path," he says. "They were very helpful as we fleshed out our programs. Our training is now anchored to what's important, both to the organization and to its workforce."

*"We're giving our employees the tools to be better at what they do, to expand their skill sets, and advance their careers."*

*– Jeff Grenzer, Head of Training and Organizational Development, The Guthrie Clinic*

## Centralization promotes consistency and cost savings

With OpenSesame, all elearning information is tracked automatically, including the time and date an employee completed a course, and scores if there were tests, instantly becoming a part of employees' HR records.

Before OpenSesame, much of the organization's management training was done in classrooms at the main offices, which meant that those individuals working at one of The Guthrie Clinic's satellite locations would have to take the time to travel to attend training. Now, with OpenSesame, employees at every location can access the training online, on their own schedule.

"OpenSesame is part of the success of our training and development program—a vital part of the solution," says Grenzer. "They have great follow-

up, and really seem vested in how well we utilize our training options."

## 94% utilization rates

The Guthrie Clinic's workforce is embracing the refocused elearning initiative. Utilization rates have soared from 3% to over 94%. Feedback from employees shows they appreciate being able to train on their own schedule, and from their own devices. They

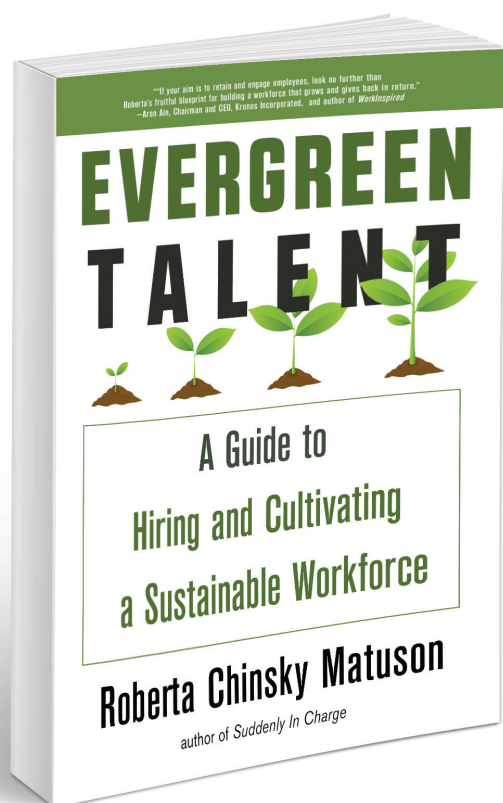
also like that many of the courses are quick and easily digestible so they can fit them into their busy schedules.

Based on the success The Guthrie Clinic had with its general workforce, the internal IT team selected OpenSesame as their curriculum provider too, with each employee receiving an additional 40 hours of training, drawing from the hundreds of specialized technical courses available.

## Promoting an engaged workforce

In addition to the practical benefits of an elearning solution like OpenSesame, including time and cost savings, one of the primary benefits is a more satisfied, happier, and engaged workforce. "We're giving our employees the tools to be better at what they do, to expand their skill sets, and advance their careers," concludes Grenzer.

***To learn more about The Guthrie Clinic and OpenSesame, contact [info@opensesame.com](mailto:info@opensesame.com) or call (888) 487-8107.***



## Grow Green

### Evergreen Talent: A Guide to Hiring and Cultivating a Sustainable Workforce

By Roberta Chinsky Matuson  
Career Press, 194 pp., \$16.95

REVIEWED BY PEGGY SWIGART

In *Evergreen Talent*, Matuson provides a bounty of ideas to grow work teams. Metaphorically speaking, she reminds readers that supervision and gardening are a lot alike. She urges us to focus on building, developing, and retaining the fruits of our labor. This book leads us step by step to growing an evergreen workforce.

Do you have people with no growth potential who need to be let go? They are the minimalists, silent complainers, passive-aggressive employees, and inconsistent performers who zap your energy from those who really need you.

The ones in need are those with potential who are now stunted. They may be micromanaged (no sunlight), mismatched to climate, underutilized on withering vines, or lack nourishment to flourish. Matuson's TLC approach will help: Tend to their development needs, lift them with constructive feedback, and champion their efforts. Then, step back and allow the blooming to begin.

According to Matuson, too many organizations throw misguided money at perks and benefits. "All the free beer in the world won't make employees delusional enough to remain with a lousy boss," she concludes.

Instead, invest in hiring the strongest saplings for leadership and offer efforts toward sustainability throughout their careers. Supervisors, not

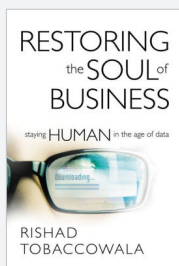
HR, should build their own teams—recruiting applicants, selecting new hires, and developing them without HR's help.

Where should you look for sprouts and saplings as future talent? Scout out college students driving for Uber or working for Starbucks. Look for energetic applicants age 50 and above. Look for nondegreed people with initiative—after all, is a degree really needed for the job?—and look to military vets. Also, don't discount your employee referral program. Build it up and make it sustainable.

Matuson focuses on building climate, commitment, employee development, and sense of purpose through great leadership. Nurture all new hires during their first year and beyond. If you don't, Matuson says you are "merely planting award-winning roses and never watering them."

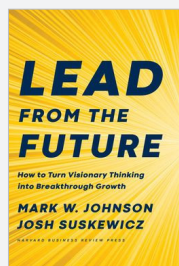
This book is filled with templates, self-assessments, and access to an additional workbook to build evergreen talent. Along the way, the author introduces her Evergreen Cultivator, a series of questions to ask new employees at their 30-, 60-, and 90-day mark. Matuson's mantra is "Prune as you go and take care of the rest."

**Peggy Swigart** is department chair and professor of HR management at Trident University at AIU; [peggy.swigart@trident.edu](mailto:peggy.swigart@trident.edu).



**Restoring the Soul of Business: Staying Human in the Age of Data**  
Rishad Tobaccowala  
Harper Collins Leadership, 256 pp., \$24.99

Many leaders have adopted the belief that data should be the center of all decisions. If it makes good business sense, the data will back it up, right? But wait—are you also providing adequate weight to the human touch? Companies that make decisions based on data alone do so with risk. Machines, robots, and algorithms cannot replicate human emotion or intuition. It's the human elements of storytelling, culture, and purpose that can contextualize data in a powerful way. In this book are seven keys for staying human in a data-centric age, a discussion on common mistakes of operating in a spreadsheet-only mentality, and more. By all means, monitor the data and do the math, posits Tobaccowala—but do so with meaning.

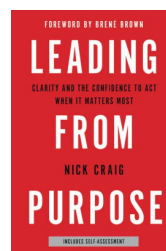


**Lead from the Future: How to Turn Visionary Thinking into Breakthrough Growth**  
Mark W. Johnson and Josh Suskewicz  
Harvard Business Review Press, 224 pp., \$30

There is a big difference between leading to the future and leading from the future. In this book, Johnson and Suskewicz describe the power of long-term planning and illuminate the blind spots that result from a present-forward-only strategy. Both present-forward and future-back thinking have their purposes. Vision, however, is the fruit harvested from future thinking. The authors explain how to take that vision and turn it into an actionable strategy. By providing easy-to-understand discussions on how to incorporate future-back strategizing into an overarching business plan, the authors make the case as to why leading from the future is essential to sustaining organizations.

## FROM OUR AUTHORS

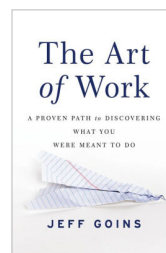
### What's on Your Bookshelf?



"We don't find our purpose; more, we reconnect to and can consciously lead from it."

**Leading from Purpose: Clarity and the Confidence to Act When It Matters Most by Nick Craig**

Craig shares his perspectives on one of the most important lead principles for today's complex, volatile, and dynamic business environment: purpose-driven leadership. Based on more than 20 years of working with top teams and senior executives on coaching and leadership, Craig offers real-life examples of how leaders define and evangelize their personal purpose, and he provides guidance on how leaders find clarity and confidence to act in times of uncertainty. —Gloria Tam



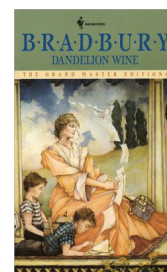
**The Art of Work by Jeff Goins**

This was a game changer for me. Goins explains that sometimes your calling and your occupation are not the same—and that is OK. He tells his story of how he learned firsthand this concept and put it into practice. When I was lost about what to do next with my career, this book served as a compass to help me find my way. —Betty Dannewitz

"A good night sleep, or a ten minute bawl, or a pint of chocolate ice cream, or all three together, is good medicine."

**Dandelion Wine by Ray Bradbury**

Bradbury's stories are timeless, surprising, and on rare occasions frightening, but each contains a kernel of underlying truth that he wants to share. His use of language is sometimes lyrical, occasionally surprising, yet straight and clear. This is a story about the marvelous summer of a 12-year-old boy in a small Midwestern town—a summer of excitement and sorrows, of mystery and family, and the occasional glass of dandelion wine. —Bob Collins





## Tap Into Emotion to Meet Learning Objectives

Deliver an engaging, effective learning experience by leveraging the power of emotion.

BY CAROLE BOWER

**T**he late great author and lecturer Dale Carnegie famously said, “When dealing with people, remember you are not dealing with creatures of logic, but with creatures of emotion.” Perhaps nowhere is that more applicable than when it comes to learning. Individuals are more likely to remember stories and events when they connect with them on an emotional level. Everyone can probably recall specific events, personal or otherwise, that have moved them in some way. Using the power of emotion in learning can have a strong impact on learning effectiveness, retention, and outcomes.

### What it is

Learning can be an emotional process: People naturally remember events and experiences that make them feel something emotionally. Emotion greatly affects learning, memory, and performance; savvy learning experience designers tap into that. By designing experiences that invoke emotions—either positive or negative—there is a greater chance that learners will take notice of and encode, store, and retrieve the information when needed. Essentially, it’s about making things stick.

### How it works

There are many books about motivation, but how do instructional designers develop a personalized,

scalable learning experience for people who have different drivers and habits? Individuals will have their own reasons for acting, so when creating learning experiences, seek out common ground. That is where emotion comes in.

For most people, a poignant story or event will elicit a similar emotional response, demonstrating why emotion is such an effective lever for learning. Rather than trying to motivate people to do something, think about how you can make them feel something.

While there are many behavioral science concepts with practical applications in corporate L&D, there are a few particularly powerful techniques every learning experience creator should be familiar with and integrate into their learning strategy. By understanding the role of emotion in learning—and helping your learners form an emotional connection with the learning content you’re presenting—you can more effectively engage learners and improve the quality of their learning experiences.

### Guidelines

Create a learning experience that taps into learners’ emotions to maximize learning impact and retention.

#### Consider the emotions you want to evoke.

Think carefully about the emotions you want to elicit among your learners. Drawing on



### CHECKLIST

## Applying Behavioral Science to Improve Learning



Make learning memorable by using content that creates an emotional experience.

core emotions—such as fear, anger, joy, surprise, sadness, and even disgust—can make learning stickier and more engaging. And while you don't want to use negative emotions excessively, and you certainly don't want to create a culture of fear when it comes to learning, even negative emotions can have a place and a purpose in your design.

When you're buying or creating learning content, think critically about whether the learning experience will engage your audience and elicit an emotional reaction. An emotional reaction is more likely to trigger a lasting memory.

#### **Motivate learners using loss aversion.**

Losing is an emotional experience. The world of behavioral science, specifically psychologists Amos Tversky and Daniel Kahneman, reveals that people feel a loss about twice as strongly as they feel a gain.

Game designers love to exploit that irrational human trait to engage players and get them to feel things as they play along. Some people may even argue that a game isn't a game at all unless there's a chance a player loses. Leveraging gamification techniques, such as awarding points that employees must actively work to keep, can be a particularly powerful learning strategy.

**Make use of social stories.** Humans are social creatures. As such, people are constantly asking themselves questions like "How will this make me look?" and "What are other people doing?"

On some level, everyone cares about what others think. And from the explosive rise of reality television and social media, it's easy to see that people also find others' stories and experiences downright fascinating. By using real-world stories and situations to harness and engage this natural social drive that everyone possesses, you can create an

#### **RESOURCES**

Immordino-Yang, M.H. 2016. *Emotions, Learning, and the Brain: Exploring the Educational Implications of Affective Neuroscience (The Norton Series on the Social Neuroscience of Education)*, 1st edition. New York, NY: W.W. Norton & Co.

Saba. n.d. "Using Neuroscience Principles to Power Learning – A Guide to Success." [www.saba.com/resources/ebooks-and-guides/using-neuroscience-principles-to-power-learning-a-guide-to-success](http://www.saba.com/resources/ebooks-and-guides/using-neuroscience-principles-to-power-learning-a-guide-to-success).

Tversky, A., and D. Kahneman. 1992. "Advances in Prospect Theory: Cumulative Representation of Uncertainty." *Journal of Risk and Uncertainty*, 5 (4): 297-323.

emotional learning experience to make learning more memorable and effective.

**Link emotion to the topic and the learner's actions.** While experiencing an emotion helps people remember relevant information, it's not enough to invoke a disconnected emotion in learners. To be effective, the emotion you want to trigger must have a clear link to the topic. Essentially, it's the "so what" factor.

Learners should be asking themselves questions like "Why should I care about this topic?" and "What will I do differently as a result of the experience?" So, don't just make learners feel sad or afraid; rather, help them make the right connections and choices.

Triggering an emotion can create a lasting and powerful effect when it comes to encoding long-term memories. If learners identify with the character in a scenario, for example, they are more likely to have an emotional response if that character suffers consequences from their poor choices.

#### **Results**

Learners are more likely to remember something if it's tied to an emotion. That's why drawing on design approaches such as dramatic storytelling, gamification, and interactive video can be incredibly effective when it comes to creating memorable learning experiences. Even music plays a key part in provoking emotions that will have lasting impact. By harnessing the power of emotion, instructional designers can create the best learning experience for learners, helping them upskill and reskill quickly.

**Carole Bower** is head of learning at Saba Software; [linkedin.com/in/carole-bower-2190087](https://www.linkedin.com/in/carole-bower-2190087).



Use gamification techniques that tap into people's natural tendencies to avoid losses.



Use real stories from real people to harness individuals' natural social drive.



Help learners feel something by showing real consequences in response to their actions.

## quick tips

# 5 Ways to Get Buy-In for AI in HR

## 1

### **Have a goal.**

Determine how your organization will use AI—something tangible that employees and leaders can understand and get behind.

## 2

### **Conduct research.**

Don't be swayed by grandiose claims of "the world's leading ..." Look for independent sources of information and talk to companies that currently employ AI.

## 3

### **Educate others.**

Clearly outline the new technology's benefits and how the upcoming changes will make for a better workflow. Emphasize the time saved on repetitive tasks.

## 4

### **Choose wisely.**

You want a vendor that will be a partner rather than a company that sells you a product.

## 5

### **Measure results.**

Having mutually agreed-upon key performance indicators ensures that your solutions provider focuses on the results you want to achieve.

Purchasing and implementing an artificial intelligence solution to secure the best talent can seem daunting. Here are a few recommendations for adopting AI for your recruiting operations.



IMAGE | ADOBE STOCK

SOURCE: MIKE PAULETICH, VICE PRESIDENT OF GLOBAL ALLIANCES, MYA SYSTEMS