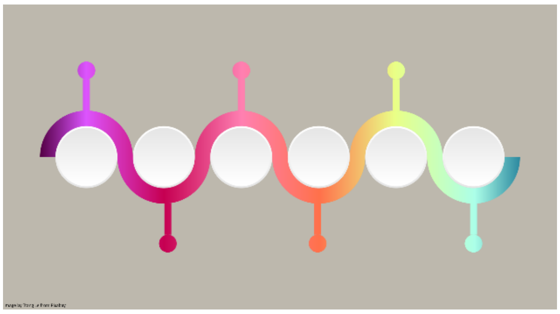

How to design learning workflows that ensure learning transfer

A workflow is a sequence of activities that will result in a defined outcome. It is a set of step-by-step instructions to get from a current state to a desired state. When we apply the concept of a workflow to a learning programme designed to get someone to change their current way of doing their job to a desired better way of doing their job, we can call it a learning workflow.

This guide will

- take you through the design steps to create a learning workflow that is guaranteed to change behaviour, and
- explain how you can deliver this using the People Alchemy Learning Workflow Platform.

Start with the end in mind

Given the end we have in mind is people doing some aspect of their job in a new way, we need to define what that change will look like when it is achieved and how we will measure success.

Let's assume we have a strategic aim of encouraging a more feedback rich culture within our organisation. What do we mean by that? How would we know that this strategic aim has been achieved?

If you want people doing their job differently, you are talking about behavioural change. Therefore, the first step in your design is agreeing on a set of behaviours that you can measure in some way; that is, the behaviours themselves are observable, or the direct results of those behaviours are observable. What would you, or colleagues see, hear, or feel when the desired behaviours are embedded into the culture?

When you have done this step, you will have a paragraph or two describing your desired feedback rich culture, and a set of bullet points of what will be observable and how you would rate or measure each of those observable parameters. This gives you a measurement scale.

Know where you are now

Your next step is to take the measurement scale you have created and apply it to the current culture amongst your target audience. You need to understand the nature and size of the gap between the current behaviour and the desired behaviour. You need to understand how big the gap is between where they are and where you need them to be. Knowing the size and nature of this gap is critical because you need to design a set of turn-by-turn instructions to help them make a successful journey across the gap. If that sounds like a satnav, you are right; it is a good analogy.

Let's assume for this guide that there is not much evidence of feedback being used well currently and indeed, it is sometimes also used badly with negative consequences. People don't know what good feedback is or what it can achieve, and often say feedback is just 'telling someone when they screwed up and how to do it better'.

Design thinking

A lot has been written in the last decade or so about design thinking and more recently how it is being brought into the learning and development arena. Design thinking is the iterative process that usually covers five phases: empathise, define, ideate, prototype, and test.

A very useful approach we have already started using with our investigation into knowing where we are now, where we want to be, and the size and nature of the gap between those two states. We need to empathise with our stakeholders and really 'get it' from their perspective, and only then can we define the gap in useful terms. Now we can start generating ideas on what sequence of activities someone would need to undertake to reliably transit the gap. Remember that design thinking is an iterative process, so we are likely to revisit the first two phases to confirm our information and seek further clarity of the problems as we generate ideas.

Proponents of the design thinking process say it is the best way to tackle what are often called 'wicked problems' because of their complexity and resistance to off the shelf solutions. Changing human behaviour nearly always qualifies as a 'wicked problem'.

Inevitably, this means that there is no single obvious right solution, and there are potentially many approaches that could work. This is why the design thinking steps of prototyping and testing are critical parts of the mix.

What follows here are a few ideas that could come out of the ideation phase for solving our example feedback culture problem. But this is not a complete list, and it is certainly not the complete answer.

Build the 'why'

Travellers on a journey, particularly a journey that requires some effort on their part, need to have a reason to engage with that journey and to show persistence if the going gets a little tough. Our diagnostics showed that people didn't really understand or rate feedback as a valuable tool, so we need to ensure that we give them a valid 'why' when we ask them to embark on this journey. Who would they listen to that they would believe? What information might help them understand the benefits for them? What stories could you tell them? What experience could they be given so they 'see the light'?

Reflection

We often learn best from our own experience, particularly where that experience generated significant emotions causing the experience to linger in our mind. We have all had experiences of receiving feedback that galvanised us into action, or stung so badly we just felt unfairly treated, and everywhere in between. A powerful activity would be to reflect on these experiences and make some notes of the common factors that occurred with feedback that felt positive and helpful, and the common factors for feedback that felt negative and unhelpful. Instead of a walk down memory lane, you could also ask people to seek feedback on a specific topic from several people and note down their reflection on the process of asking for and receiving feedback. Discussing these reflections and stories with peers would probably be a useful exercise.

Some knowledge

Let's assume that from our investigation in the first two phases of our design thinking process, it's obvious that our learners need more knowledge of feedback than what they have, so we need to provide it. Empathising with our audience helped us understand the existing knowledge gaps and how we might fill them.

We need to consider what knowledge they need and when they need it in their learning journey to help them take each next step as they travel across the feedback skills gap. For example, they will need to know what good feedback looks like, how to prepare to give feedback, how to setup a feedback session, how to establish appropriate rapport, what could go wrong and how to fix it, and how to follow up.

Notice that there is a sequence here as they embark on and continue their journey. It makes sense to drip feed this knowledge on an as needed basis in bite sized digestible chunks, and then give the learner activities to utilise the knowledge and see how it works for them in practice. Using new knowledge embeds it into longer term memory and defeats the forgetting curve made famous by Hermann Ebbinghaus. It also shows the learner how they can personally use this knowledge. It becomes more than an abstract concept when it is put into action.

The concept of digestible is important here. Too much knowledge at once and/or knowledge in the wrong format will simply pass through and not be digested. Consider how you can divide the knowledge into digestible chunks and space it out over time on an as-needed basis and to ensure the cognitive load is balanced over time as they navigate their journey.

Practice

We all know that theory and practice have an interesting relationship. When we apply our theoretical knowledge, we often find that what happens in practice is variable, and only repeated experience gained from repeated practice will help us hone how we apply the theory in our own context to get predictable results.

What practice activities are needed to prepare and deliver feedback? How many practice sessions would lead to an adequate level of skill? What variation of practice scenarios is required? How can the feedback process be divided into components to practice independently, then as a whole? How can a learner measure themselves as they practice so they know when they have reached an adequate level of skill?

Support

Any learner practicing new ideas will get better results when they get support, so what kinds of support will make the most difference? Support can be provided in many forms: an experienced mentor to share their stories, a coach to talk things through, a cheerleader to provide encouragement, a manager to provide time and opportunities to practice, colleagues to share with.

Support can also be in the form of resources to provide additional material for those who like to read around a subject or watch videos of best practice. How can you organise and make this support resource available, so it is accessible during the learner's journey, and afterwards?

Observation and assessment

As the learners' journey progresses, we need to be aware of their progress, and to get an early warning if they have strayed from the path. This means measurement, and for a behavioural destination, this means observation and assessment.

At the beginning of this article, we talked about understanding the desired destination in terms of observable behaviours. How can you set up observation of the learner, and assessment of their progress against the behavioural criteria established at the beginning?

The learner should be fully aware of the success criteria and be encouraged to measure themselves against those criteria as they progress. Alongside this, they should be getting feedback from others on how well they are doing. Of course, given the topic of our learner journey, this is an opportunity to model excellence for them.

More ideas

This is barely scratching the surface of the range of ideas you could come up with for the activities that could be incorporated into the step-by-step instructions for a learning workflow. And of course, it's not just you who should think about this. It makes sense to get the different stakeholders involved in the ideation. Think about how you can expand your ideation phase to get a rich set of ideas to choose from as you start to prototype a learning journey.

Four critical success factors

Think about your satnav. There are four critical success factors:

1. Know your current location
2. Know your destination
3. The turn-by-turn instructions are fit for purpose
4. Follow the instructions

We have the same four critical success factors when we are talking about learning journeys:

1. Know your current behaviours
2. Know your behavioural destination
3. Design a suitable set of step-by-step instructions
4. Learners follow the instructions

Learning workflows

The step-by-step instructions for a learning journey to achieve a behavioural change make up a learning workflow. So, what does a learning workflow look like when it is designed to embed new feedback skills?

At a high level, maybe it might start something like this:

1. Content: What is feedback and why it is important
2. Ask for feedback from 2 people within the next week
3. Reflect on this feedback and record your thoughts
4. Answer a questionnaire to help the learner understand, "How good am I at feedback skills?"
5. Content: Some tips on feedback
6. Reflect on your best experience of receiving positive feedback
7. Reflect on your best experience of receiving corrective feedback
8. Describe your thoughts and feelings when someone offers to give you feedback
9. Describe your thoughts and feelings when someone asks you for feedback
10. Share in a few sentences your best feedback experience, either positive or corrective, and what made it work for you
11. Content: Watch some short videos on feedback skills
12. Today, look out for opportunities when someone on your team (or family/friends) does something good. This could be a small thing; it does not have to be a major project
13. And so on…

You could easily end up with 50 or more activities when you include the required practice sessions, recall for embedding knowledge, questionnaires, etc. The list of activities should be arranged into a chronological sequence although clearly some activities would be sequential, and some will overlap and run in parallel. Each activity should be described in enough detail that the learner knows what they need to do, and what the output should be from the activity.
You now have a learning workflow, a sequence of activities that must be delivered to the learner over a period of time. This is where a learning workflow platform comes in. You need a way to deliver all those activities to the learners against a schedule and track the progress of each learner through the activities.

Schedule
One aspect of your workflow design is the schedule and for many in L&D, this is a new factor to consider. If your experience is mostly event style learning interventions, you will not be used to thinking in workflow terms where the learning activities are spread over time.
When designing a workflow schedule, you need to think of balance and progression.

Balance: Consider the cognitive load of the activities in the workflow. Ideally, you want this to be spread along the workflow with no major peaks and few troughs. This is very unlike a training event where it is easy to overwhelm people with a high cognitive load to the extent that they cease to take anything in. And also consider the physical load. How much time each week will the learner need to do the workflow activities? You should be designing a schedule that provides a balance of time required with no peaks or troughs and is within the time that can be made available to learners.

Progression: When someone starts practising a new skill, they just need the basic knowledge required to practise at their level. As they improve, they will need more than the basics. If you give them too much advanced knowledge early on, it is often demotivating and is unlikely to stick anyway. Consider progression of both knowledge and practice exercises. The key is drip feeding what is required when it is required.

With balance and progression in mind, assign a schedule to the list of activities. Little and often is a good rule of thumb.

Learning Workflow Platform

If you want to deliver your learning workflow to more than even a few learners, you will need a digital solution, a Learning Workflow Platform (LWP). Consider a simple workflow which might have five activities a week for 5 weeks. For only 10 learners, that is 250 activities to deliver and track. For 100 learners that is 2,500 activities.

A LWP will do all the heavy lifting for you in terms of automating the delivery of the activities, tracking completion, engaging other stakeholders, sending reminders, providing reports, enabling assessment and much, much more. You need to be able to set it running and then see where all your learners are on their workflow journeys at a glance.

A LWP will help you immensely when you come to the 'test' phase of the design thinking process. Find the learners who are doing well and learn from them what is working so well for them, and how they are utilising the workflow. Find learners who are not doing so well and ask them what can be changed so they are able to make the journey and keep up with the activities. In addition, you will have the measures you have incorporated into the workflow at milestones to check on progress towards the defined behavioural outcomes.

Summary

Most L&D people focus on delivering learning. An L&D professional wants more than that. They want that learning to mean something, to have an impact on the way people perform. That is, they want learning transfer, so the learning is operationalised in the day-to-day flow of work in a useful and positive way.

A learning workflow delivered using a good Learning Workflow Platform like People Alchemy will enable you to put an emphasis on learning transfer so the learning you deliver results in beneficial behaviour change and new work habits.

Your next steps

Get in touch and we can show you how you can design effective learning workflows:
peoplealchemy.com/book-a-demo/
hello@peoplealchemy.com
+44 (0)330 113 3005