# Designing From the "Outside-In":
## *E-Learning that Fits the Business*

**By Mark W. Brodsky, President and CEO, Ulysses Learning**

*This article first appeared in the February 2003 edition of E-Learning Magazine Online and is reprinted here with their permission.*

In Kurt Vonnegut's book, Player Piano, engineer Ed Finnerty complains, "If only it weren't for the people always getting caught up in the machinery, earth would be an engineer's paradise." Of course, Finnerty misses the point. Technology exists for people; people don't exist for technology. When it comes to designing e-Learning programs this quote is particularly meaningful. To help keep learners from being "caught in the machinery" and to ensure learning truly fits a company's goals and objectives, consider the four cornerstones of E-Learning design.

**The Four Cornerstones of E-Learning Design**

This approach, while not radical or new, is a thoughtful plan based on the foundations of sound instructional design, development, and implementation. It helps companies achieve their desired business results by delivering meaningful, measurable and sustainable improvements in performance.

1. *Analyze performance based on goals.* Conduct a thorough performance analysis based on business goals, such as improved service or increased sales.

2. *Identify training needs.* Work backwards from the performance analysis results to identify the best training methods and resources (e-Learning blended with other training methods)

3. *Design training program.* Design training that is conducive to achieving the performance goals identified for the short and long run.

4. *Execute the training.* Rollout program with a comprehensive implementation approach.

**Analyze Performance Based on Goals**

Examples of performance improvement goals include increasing sales, improving customer satisfaction and boosting productivity – each with specific measures identified. Start by answering a few key questions:

- What will improved performance results look like and how will they be measured?

- What are the barriers to increased performance? (Human performance, process, technology, product, market, etc.)

- What gaps in skills and knowledge need to be developed?

- How can training improve performance?

- If they are beyond the scope of training, how might factors affecting performance be addressed? (Process, technology, product, market, etc.)

For example, a national credit card company conducted a performance analysis of its declining customer satisfaction scores, from calls handled through its contact center. The company found its customers' number one concern was how long they had to wait to speak with a representative. Among the main contributors to this performance issue included the contact center's ineffective staffing levels, equipment, and processes, none of which are issues that can be directly solved through training. Yet there was another lesson: training the representatives on how to quickly and effectively resolve customer issues and effectively handle irate customers can positively affect customer satisfaction. Accomplishing that learning objective while addressing the identified "non-training issues" would have a positive impact on this company's customer satisfaction ratings.

**Identify Training Needs**

Once the performance analysis is complete the objective is to further analyze the

knowledge or skill gap needing development and determine the most applicable training methods for the task at hand. "You go from learning goals to mistakes, find the obstacles to success, and then determine the appropriate training methodology," explains John Cleave, Ph.D. and Principal of Experience Builders in Chicago.

Further analysis of the sales and service improvement objectives, from the previous credit card company example, indicated the need to develop better knowledge of the company's products, services and procedures. However, examining barriers to better performance exposed the need to develop better decision-making and customer interaction skills. By improving these skills, the company's representatives would meet customers' needs more consistently and completely, balancing high levels of sales with high levels of service. That development need is often overlooked when it comes to sales and service improvement. Says Cleave, "Training and development dovetails with virtually everything you're doing in an organization." Once the knowledge and skill gaps are sufficiently pinpointed, it's important to determine when e-Learning best fits the development objective and when to consider other training methods.

**Design Training Program**

The e-Learning industry seems to be in a period of reassessment, searching for a more clearly defined understanding of the role it is best suited to play. Cleave likens it to the PC revolution of the 1980s, "As with most revolutions, it created a lot of jaded participants. Early on, everyone gets caught up in the maelstrom, doing it just because it's the thing to do. Then there is a period of stasis when people realize, 'This thing has really been useful but it's not necessarily going to solve every problem.' Today, everyone uses PCs but we have a much better understanding of how and when to apply them."

Clearly e-Learning is not the best solution for *all* types of learning. For example, it

cannot provide the best forum for participants to question and challenge the applicability of a new process, nor does it allow them to voice their concerns and hear from others regarding possible roadblocks to its success. Even further, it means they never share examples of how they approached a similar effort in the past and successfully overcame related obstacles. Nothing can provide the opportunity for dynamic interactions with others like a classroom can. "At our roots we're social animals," says Cleave, "Classrooms are never going to go away."

But for other areas of training, e-Learning is unmatched. Says June Davis, an independent consultant specializing in e-Learning development and implementation, "I knew e-Learning would work, but I have been absolutely *stunned* by how well it works. I've seen people who are struggling even after they've been through great classroom training that included role-plays to learn and practice sales and service skills. They struggled with the new skills – not only as they completed their training – but especially when attempting to apply the newly learned skills on the job. But when a different group of trainees were given the opportunity to learn the same skills through simulation-based e-Learning, the contrast in their improved skills and overall confidence level was remarkable." Davis believes it's the methodical practice– the ability to make real mistakes, learn from those mistakes, and receive just-in-time coaching at the point of failure – that simulation-based e-Learning offers.

E-Learning gives the participant freedom to learn in the style that best works for them. For example, learners may choose to answer questions wrong only to see what the subsequent feedback will be; in this case the category would be experiential learning. This type of learning rarely happens in a classroom setting.

Consensus is also building on other ways e-Learning is superior to classroom training. E-Learning is unmatched for ongoing training. Also e-Learning, appropriately designed for the task

at hand, can deliver training whenever, wherever, and on whatever is needed. Says Warren

Bobrow, Ph.D., industrial psychologist and Principal of The Context Group in Los Angeles, "A

learner can go back to a specific portion of the training whenever he or she wants or when

instructed to do so by a supervisor... and can jump into a particular module rather than waiting

for the next class to be put together. It allows easy refreshers for veteran agents who may be

having trouble with particular skill sets and allows them to go to the module they need."

As effective as e-Learning can be, too many solutions have fallen into the trap of e-

Learning design at the expense of the learner - simulation for the sake of simulation, which is a

dead end. Says Cleave, "When you get beyond the 'cool' factor, if the training doesn't help

achieve the results, it doesn't matter how 'cool' it is."

An important strategy for designing e-Learning that focuses on the learner and real

performance improvement is to assemble the right team of people with the right expertise. Make

sure:

- Learning design and development expertise is up to date and current on e-Learning
  methods and tools and that developers are experienced in utilizing and blending other
  training methods.

- Those developing content are well versed in the related subject matter or seek
  considerable input from those who are. Without quality content, you will never develop
  the level of effective e-Learning that reliably delivers the desired performance results.

- IT staff is knowledgeable of the organization's technical infrastructure and can integrate
  and support the e-Learning application including Internet/intranet access
  (security/firewall), servers, desktop applications, workstations and Learning Management
  System.

- End users are involved in the process, including representation from the target training participant group and line management accountable for the performance results.

- Reaction, learning, application and performance results, as well as other appropriate ROI-related measures are addressed and they align with the organization's accountability and performance management system.

- Implementers have the expertise to identify and develop organizational support requirements for the training initiative and address all related change management issues.

- Project management personnel stay on track, on time and within budget. This becomes especially important as the scope and complexity of the development and implementation increases.

The expertise outlined in the bullets above may reside in a team of many or few depending on the scope of the e-Learning initiative and ability of the design team members to assume multiple roles and responsibilities. While the entire team is not required at every stage of development, they are required to meet early in the concept and design stage before development begins. That will ensure *all* performance, learning improvement, and support requirements are identified and included as part of the overall e-Learning design. The entire team also needs to meet at specified junctures in the development cycle to review important project stages like early user and functionality testing.

**Execute the Training**

Once the e-Learning is designed along with the appropriate blend of other training methods, use the project team's expertise for technical and organizational implementation of the pilots as well as for the broader training program rollout. Members of the design team should monitor the results within their areas of expertise, as well as the overall learning and

performance results. More often than not, design and implementation refinements will be identified in the pilots and during the broader rollout. Finally, decisions need to be made as to when the changes will be incorporated, in the program version before, during, and/or after its initial release.

As the e-Learning is being prepared for release, additional resources need to be well prepared in advance for their vital support role. "Like anything else, e-Learning requires good coaching to make it work and there still needs to be a good performance management system to monitor people's results," says Bobrow.

"In the context of e-Learning, traditional classroom trainers have found an emerging role as coaches, facilitators and mentors – anywhere that personalized, one-on-one attention is key," says Davis. "Trainers serving as coaches, facilitators and mentors can play important roles helping the learners overcome barriers to applying their newly developed skills on the job. Through the scoring methods that e-Learning provides, trainers now have access to their learners' baseline knowledge of a topic area – which allows them to tailor face-to-face training or coaching sessions. This type of method also increases the likelihood of changing the learner's performance.

Furthermore, throughout e-Learning implementation, management (with support from selected members of the deign team, trainers and coaches) needs to ensure that training participants are being held accountable for applying their newly learned skills, achieving the desired results and receiving coaching as required. In addition, companies that engage in ongoing monitoring and analysis of results can more easily identify if the targeted learning and performance goals were achieved and help identify ways to improve and fine-tune the current and subsequent e-Learning design and implementation.

**In the Final Analysis**

Designing effective e-Learning that keeps learners' needs in mind requires that any infatuation with technology, in and of itself, be put aside. The real focus must be on the practical execution of basic, sound instructional design and development principles. The result will be learners who are not "caught in the machinery" but are truly enabled by the e-Learning technology and measurable, sustainable, and meaningful performance improvements for the organization.

*About the Author:*
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Ulysses Learning is a global learning and performance improvement company that delivers measurable and sustainable results in service, sales and coaching. It is widely recognized as the leader in helping companies build judgment - sound decision making and advanced interaction skills - at the point of customer contact though it's dynamic, simulation based learning and related services. To reach Mr. Brodsky, please call (800) 662-4066, or send email to mbrodsky@ulysseslearning.com. For more information on Ulysses Learning, visit the company's website at www.ulysseslearning.com