Will's NOTE:

Let me emphasize that this is a rough draft. It was not copy-edited and it is not in its final version. I make it available to get a conversation going and to provide value for my clients and the work-learning field.

This is a chapter from my forthcoming book, *Work-Learning*.

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Quotes from this chapter:

Unfortunately for us, we're the training weenies. We're the spineless gelatin of the organizational world. Our betters tell us to heel, and we lick their boots.

I used to believe—foolishly I see now—that all we had to do was "educate" our stakeholders to change their mindsets…If you want to change a long-tenured organizational practice, utilizing a short-term education tactic will be grossly insufficient.

Stakeholder management allows us to swim upstream because it temporarily slows the water so that we can make progress. Ideally, to create meaningful sustainable change we would reverse the heavy flow of our organization's cognitive trajectory. In other words, we would develop new mindsets all around. We would aim to float downstream with our coworkers, in a flotilla of inner tubes, bobbing contentedly, lovingly embraced in the warm water a new collective mindset.

By being embedded in the battle, I've come to see how difficult it is to move the workplace learning team toward more effective approaches.

Two warnings to aspiring visual-model creators—be very careful to communicate all the right messages, and realize how difficult it is to create a model that is both simple and true.

We in the training field have an inherent tendency—damn if I haven't seen this over and over again—to believe in our power "to train." We seem to believe that our words, our stage presence, and our unique ability to use powerful metaphors can enlighten all who hear our clarion calls. This is one of our biggest failings—we believe too much in the power of our own words.

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Chapter 41 (or thereabouts—chapters are always morphing and moving as I write the book)
Leading Change to Better Training-and-Performance Design

If you and I, as workplace learning professionals, are all about learning, then we are all about change. Change is inherent in learning.

But there are many kinds of change we must master as work-learning professionals.

1. Helping Learners in Learning
2. Helping Learners in Application of Learning
3. Pushing Stakeholder Action
4. Creating New Stakeholder Mindsets

Only the first two types are specifically related to learning. We've already talked about these early in the book. We can only maximize learning outcomes if we help learners in learning, persuade them to apply the learning, and help them persevere in applying their learning.

We must also help push other organizational stakeholders to action to maximize learning outcomes. For example, when learners' managers support learners, we get better outcomes. When senior management supports a strategic initiative and the learning needed to achieve it, we get better learning outcomes.

This chapter will focus on Pushing Stakeholder Action and Creating New Stakeholder Mindsets—numbers 3 and 4 in the list above. While these overlap somewhat, it's helpful to differentiate the two. By separating them, we'll be less likely to miss taking actions that are required for our success.

Before we look at these two imperatives, I offer an introduction to remind us why change-management is so critical to us.

But What Changes Do We Have to Push For?

Some will ask, "What changes do we, as work-learning professionals, have to push for?" The implication is that we should just focus on doing our jobs—that by keeping our heads down we can accomplish what we need to. This kind of thinking is naïve of course. To maximize success in any field, in any organization, in any lifetime; pushing for change is a bottom-line requirement.

Just to be clear how prevalent our need for change is, let me share the following non-exhaustive list:

- Recommending that the organization utilize a new leadership-development program.
- Pushing against the desire of powerful people to use some new learning fad in an inappropriate way (e.g., learning styles, e-learning, podcasts).
- Recommending the adoption of a new learning technology.
- Requesting improvements in current learning technologies.
- Asking or defending the amount of budget available.
- Convincing subject-matter experts to use more effective learning methods.
- Asking learning developers to go the extra mile to create something really great.
- Getting permission to utilize more sophisticated learning-measurement methods.
- Getting one's learning team on the same page, given their varied backgrounds and differing opinions on the best learning-design approaches.
- Getting external customers to buy your learning innovations.
- Getting internal customers to take the time to contribute to a needs analysis.
- Getting the organization to fire or reassign learning professionals who are underperforming.
- Getting learner's managers to contribute more to the application of learning.
- Getting teams to accept more than just a few of the learning-and-performance design recommendations put forward.
- Convincing internal teams to be willing to work with outside resources.
- Encouraging more coordination between product designers and work-learning professionals to create more intuitive interfaces.
- Prompting learners to utilize more effective learning methods.
- Convincing learners to share what they've learned with others.

I'm going to stop there, but this list could go on for page after page. We—as work-learning professionals—cannot be truly successful unless we push for change.

Pushing Stakeholder Action

Stakeholders are people who can influence the outcome of an action or set of actions (for example a change initiative)—especially people who care about the effects of those actions.

If Karina wants to upgrade the graphic-design software to the latest version, her change-management initiative will need to take into account many stakeholders. Johan, the graybeard of graphic design, might be resistant to having to learn the new interface. Chelsea in IT might have concerns about whether old file formats will still be useable. Stanley the CFO might wonder whether the cost is worth the benefit. Karina's team might wonder if Karina has the influence to get what she has promised. Karina's boss may wonder whether he'll catch flak by allowing Karina to mount a change initiative. Bob, who sees himself as Karina's superior, may feel jealous that Karina's effort will make her a hero in the department. Gwyneth, Karina's mentor may call in some favors to see that Karina's effort succeeds. And this is a relatively straightforward change—software upgrades are commonplace. Imagine the tangled web we must navigate when we try to convince learners' supervisors to support after-training application, or we try to change from a course-centric model to a performance-focused model.

Different stakeholders have different power to influence outcomes and different types of power they can bring to bear. Some can outright block initiatives, or simply say yes to them. Others are opinion leaders who can influence others. Some can spread negative rumors about the person leading the change or denigrate the change itself. Others can lend moral support to the change leaders. If you are going to lead a change, you'll be more successful if you take time thinking about the stakeholder environment that floats above the work itself.

Why Stakeholder Management?

Stakeholder management, at its essence, is an effort to maximize the number of key players who support a particular change initiative—and minimize the number of key players who will attempt to block or resist an initiative. Week-long courses have been written on this topic. Whole books have been scribed. Here I will present only the key nuggets—looking at it specifically from a workplace learning perspective.

Let's start with a basic question. Why do we, as workplace learning professionals need to manage our stakeholders? Like all organizational actors, we work with others. If our efforts are blocked or resisted, they will not succeed. If they are not supported, they will not create all the benefits they might.

But why do we as workplace learning professionals need to push for change? Mostly because what we do now is completely inadequate—as I hope I convinced you in Book 1. We are underperforming on our mission.

We have two basic stakeholder groups that we must contend with—and I do mean "contend." We have our business partners and we have ourselves. In the next chapter we'll talk more in-depth about how to have productive relationships with our business partners. We need them to help us go beyond the training-course mindset, to be willing to adopt new technologies and new learning approaches, to

spend a little more time supporting the application of learning by those who they supervise, to consider non-training performance-focused solutions, and so on.

But dear reader, you must be wondering, why must we contend with ourselves? Why must we stakeholder-manage ourselves? The answer is simple—mostly because we are our own worst enemy. I'd estimate that less than 10% of us really understand that training alone is not enough—that it is professional malpractice. The other 90-plus percent needs to be head-slapped, enlightened, inspired to change, or terminated. All right damn it; we can start with stakeholder management instead of firing everybody—getting more folks to support a performance-focused approach, embracing a more complete learning landscape, utilizing research-based recommendations, among other things in our work as instructional designers, trainers, e-learning developers, performance consultants.

The goal of stakeholder management is simple. We hope to engender more support and less resistance. At a minimum, we want to encourage[1] the following:

1. Supporters to become champions with us.
2. Neutrals to become supporters.
3. Resisters to become neutrals.
4. Blockers to become lazy resisters.

Champions are those who bring considerable energy and time to the battle—often driven by a passion to reach the goal.

Supporters are those who support the change, but don't bring the same amount of self-generated energy as change Champions.

Neutrals are those who are either on the fence (not sure whether to support or resist) or who have not really engaged the issue to have an opinion yet.

Resistors are those who are against the change, but who don't bring to bear high levels of self-generated energy against the change.

Blockers are those who are against the change and utilize considerable energy and time in attempts to actively block the change.

[1] I learned to think of change-management in this way by working with Lance Berger, author of *The Change Management Handbook*, in designing a course on championing change, although I have modified the particulars here.

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The Process of Stakeholder Management

The first step in stakeholder management is to determine who your stakeholders are—stakeholder mapping as it is sometimes called. Who are all the people who will be affected by your change initiative? Who are all the people who might affect it—positively or negatively? Once you've got a list, then it's a good idea to determine whether they are likely to support your effort or be against it. The best way to do this is to know them deeply by having had a long-term working relationship with them. Obviously, this is not always possible—but it does point out the benefits of (a) being an active networker within your organization and (b) of just being a good friend to many. The more understanding you have of the people in your work landscape, the better your change-management chances. Similarly, the deeper the relationships you've already cultivated, the more people you'll be able to draw on for support—and the fewer blockers you'll face.

It's often worthwhile in the beginning to gather a group of trusted associates or reach out to folks as individuals who you know will be on your side. Change management is difficult to do on your own. By getting input from a group of trusted advisors, you can do an initial assessment of your stakeholders to determine their likely perspective on your change initiative. The next best thing to do is to go talk to all (or most) of the stakeholders before you have a formal proposal or concept put together and ask them informally how they would feel about such and such, what improvements they might make to the idea, etc. This gets tricky because you may not want to alert your likely enemies, but on the other hand, you don't want to alienate folks further by being caught conspiring between cubicle walls.

To help you think about your stakeholders, you might find the following stakeholder-mapping table useful:

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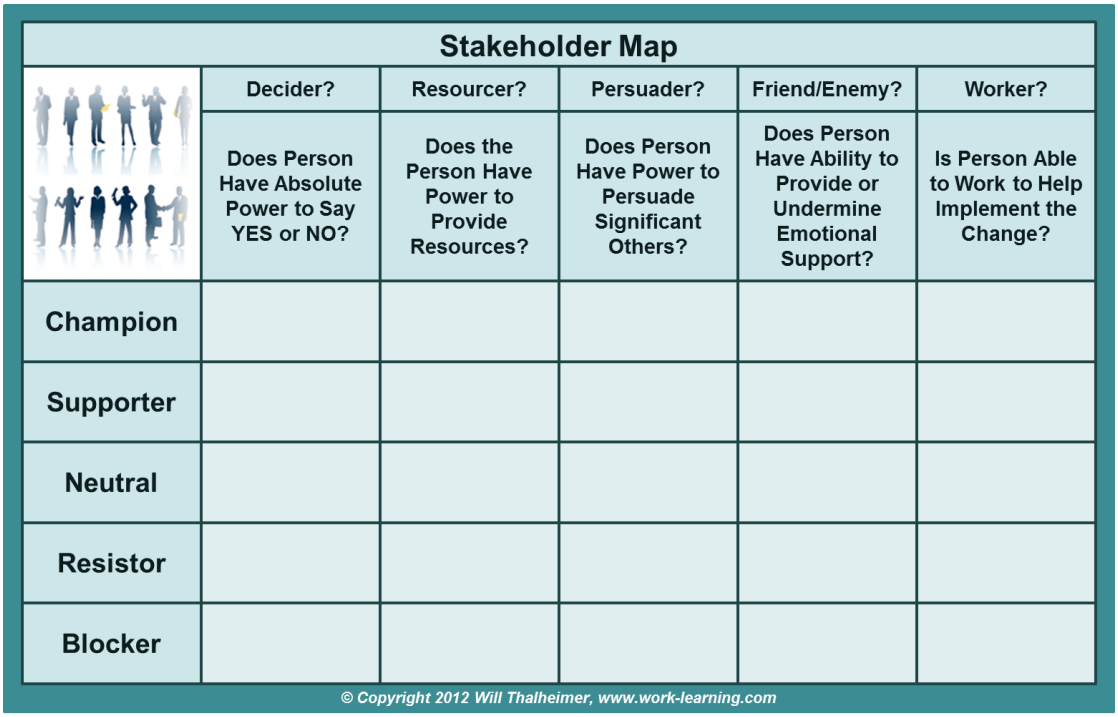

Stakeholder Map					
	Decider?	Resourcer?	Persuader?	Friend/Enemy?	Worker?
	Does Person Have Absolute Power to Say YES or NO?	Does the Person Have Power to Provide Resources?	Does Person Have Power to Persuade Significant Others?	Does Person Have Ability to Provide or Undermine Emotional Support?	Is Person Able to Work to Help Implement the Change?
Champion					
Supporter					
Neutral					
Resistor					
Blocker					

Available at www.work-learning.com/catalog.html

With your group of trusted advisors, develop your list of stakeholders and put the names of each person in one, OR MORE, of the cells above.

When you're analyzing your stakeholder-map results, keep the following in mind:

1. Don't forget to put yourself in the table where appropriate.
2. There can be more than one Decider—and often are.
3. Ultimately, you'll have to get each Decider to agree (or someone above a Decider in the chain of command).
4. Note that in addition to enlisting the Deciders, you really need to enlist each role. Your change effort will almost certainly fail if you don't get your Resourcer to provide the resources you need to carry out your efforts. It will fail if you don't get Persuaders to persuade important key others. It will fail if you don't enlist Friends to provide emotional support and discourage enemies from nicking your psyche. Your change effort will fail if you don't have Workers to actually do the work of implementing the change.
5. A stakeholder map is a snapshot at particular point in time. As you are trying to move each person up a level or more (for example prompting Blockers to become Resisters or Neutrals), you'll want to keep track of your progress by updating your stakeholder map once in a while.

6. Since most significant change efforts take time, don't discount the importance of emotional support for the Champions of change—including you. Many change initiatives fail because it's so hard to maintain energy and optimism in the face of withering resistance. Emotional support has both a positive side and a negative side. Others can support us and others can wear us down by being dismissive, by influencing others against us, by dishonestly acting supportive in public but working to block our efforts in private—a situation we almost always recognize at some level, wearing us down psychologically.

7. Don't undervalue the Workers. Changes ultimately have to be implemented. Workers are needed to implement the change you are championing. In a very real sense, every person who works to implement a change is a small-d decider—they decide how much love and effort to devote.

8. Every change effort requires resources. Make a list and figure out what will be required. There's no sense pushing for a change if you won't have the resources to make it happen.

9. Finally, remember that you are not a god. You are not omniscient. Your stakeholder analysis will be inherently a best guess. Nor do you have the time to make it fully enlightening. Still, if you can prevent the most obvious blind spots, you may avert failure.

Novice change champions often make the mistake of putting out full-blown proposals without asking for informal feedback first. If you're the only one in a power position—if you are the only Decider—this may work to get compliance, but it's unlikely to get full buy-in and support. Also, it risks alienating large numbers of stakeholders who might have supported your effort if you'd just asked for their input before you went public.

Still, there may be times when ignoring stakeholders will work, and I won't be Pollyannaish in rejecting this out of hand. You're more likely to have success without stakeholder involvement if (a) you're the CEO or some other ultimate boss or your management just rubber-stamps your actions, AND (b) your peers and direct reports are already aligned and supportive of the general thrust of your change initiative, AND (c) you can clearly demonstrate how your change initiative is similar to previous initiatives that have met success, AND (d) you can align your change initiate to other organizational initiatives or strategic directives, AND (e) you are an almost unanimously respected, admired, and trusted member of your organization. That's a high bar, if you hadn't noticed.

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When the Velvet Hammer of Stakeholder Management is Not Enough

When I was a leadership trainer, my favorite—and daresay I, the best—course I taught was a course on how to champion change. Most managers I met were much better at managing the status quo than pushing for change. It was my best leadership-development course, I think, because it was so easy to make a difference. Since that time in the late 1990's, when change management was all the rage, championing change has become a staple of leadership-development programs. Unfortunately, one of the things that doesn't get taught—and I certainly failed in this regard—is that pushing for change can require both soft power and hard power.

Different organizational cultures require different amounts of each. Most courses on championing change focus on soft power—things like stakeholder management, getting buy-in, overcoming resistance, and recruiting change-responsive individuals to join the effort, etc. While all these techniques are wonderful and generally effective—sometimes a champion needs to utilize hard power—firing or disciplining the unresponsive, demanding excellence in no uncertain terms, having an uncompromising vision, taking on the powerful, kicking ass when asses need to be kicked. Read Steve Job's biography if you want to see how hard-power change management can be effective at times[2].

Unfortunately for us, we're the training weenies. We're the spineless gelatin of the organizational world. Our betters tell us to heel, and we lick their boots. All right, I'm exaggerating. Often we heel without licking, employing self-righteous grumbling instead. On the other hand, bless those of us who are survivors, who've learned to live to fight the good fight on another day. As I told my change-champion learners, "Don't get yourself fired. You won't get the changes you want from the unemployment line." Let's use our emotional intelligence here. Hard power is more appropriate within our own tribe—within our group of work-learning professionals—not so much with our business partners. In the next chapter, I'll talk about how we need to be full partners with the business side, not just their lap dogs. Unfortunately, our tendency to heel to power has made us soft with one another. Those of us at the higher altitude of the work-learning mountain need to be more assertive in pushing for change and in helping our change champions by utilizing hard power within our ranks when it is needed.

Here's my message: Most of the time we need to utilize soft-power change-management techniques, but we should have a few hard-power arrows in our

[2] I wouldn't recommend a Steve-Job's approach for everyone. He had certain characteristics that made it easy for him—charisma, good looks, proven success, power of position, and wealth. I wouldn't recommend the belittling of others, nor the black-and-white thinking, nor the unrelenting stubbornness. And note that Steve Job's also used soft power too, creating an inspiring vision, encouraging people to greatness, utilizing powerful metaphors. Still, more of us could stand up to be counted—to make a difference. More of us could take risks. More of us could use hard-power when it is needed.

quivers when steel-shanked boot leather is needed. And sometimes as change champions we need to find others who will dole out the hard power to support our efforts—more senior managers and the like. If you want to walk to the other side of the savanna, through a sea of wildebeests and lions, you might want to walk with the elephants.

Creating New Stakeholder Mindsets

Pushing stakeholder action is a short-term strategy, designed to get immediate results for one particular change initiative. If we stopped there, we would not nearly maximize our success in pushing for change. Stakeholder management allows us to swim upstream because it temporarily slows the water so that we can make progress.

Ideally, to create meaningful sustainable change we would reverse the heavy flow of our organization's cognitive trajectory. In other words, we would develop new mindsets all around. We would aim to float downstream with our coworkers, in a flotilla of inner tubes, bobbing contentedly, lovingly embraced in the warm water a new collective mindset.

I hope you noted the aspirational nature of that last sentence. Such as state of Kumbaya is not really attainable—so don't get frustrated if you aren't issued an inner tube or find yourself bobbing in the caress of a warm embrace. But here's the notion. The more that all the minds you work with have the same mental models of how learning works to create on-the-job performance, the more easily you'll be able to work together to maximize individual and organizational performance. With a singular vision and a common set of goals, the work will be easier, more pleasant, and much, much more productive.

But the question then becomes, "How can we create new mindsets in our many stakeholders?"

Until recently, I hadn't fully appreciated how important this issue is, but I'm a lucky man. I've had the privilege of being invited into companies as a long-term consultant. By being embedded in the battle, I've come to see how difficult it is to move the workplace learning team toward more effective approaches.

One of the secrets to life is figuring out what causes what. As a human being we learn that nothing is guaranteed, but if we focus on some critical leverage points we can significantly increase our chance of living a good life. For example, we learn that education can provide both wisdom and career opportunities; that good health depends on good eating, regular exercise, and a good night's sleep; that finding a good life partner is critical in many ways; that working hard and working smart propels accomplishment and financial stability; that rest, relaxation, and having meaningful social connections enables healing and health;

and that reading and learning builds knowledge and wisdom and helps us see opportunities and connections that otherwise we'd miss.

Success in life depends on figuring out what these key leverage points are and then doing what we need to do to utilize these levers to increase the likelihood of our success. It's the same in the work-learning profession. Only if we figure out the key leverage points can we hope to maximize the likelihood of our success.

I used to believe—foolishly I see now—that all we had to do was "educate" our stakeholders to change their mindsets. If we just had the opportunity to get in front of our stakeholders with the right visuals, the right metaphors, and the right demeanor, we'd be able to convince them to walk with us down the gilded brick road. But alas I've learned that injections of knowledge—even injections of wisdom—are not enough. We do need to educate, but we must do it with many weapons, and we must do it time and time and time again. The race may be to the swift and the battle to the strong, but winning hearts and minds goes to those who have love and stamina enough to persevere.

Let me digress for a minute to emphasize an important point. If you want to change a long-tenured organizational practice, utilizing a short-term education tactic will be grossly insufficient. Long-tenured practices are like old trees, with roots that run wide and deep—roots that are not easily dislodged en mass. Your brilliant message, your attempt to educate, may dislodge a root or two, but there are always other roots that continue to nurture the old wood. To enable a new way of doing work-learning, we need to find the key leverage points so we can dislodge the strongest roots of the old ways. We need to utilize sufficient leverage points to weaken enough of the root system to finally knock down the old tree—so we can plant another.

We can begin by talking about how to educate our stakeholders—and I'll do this next because that will seem most natural—but we must go beyond mere education events.

A List of Work-Learning Leverage Points

Overt Persuasive Messages

1. Written persuasive messages
2. Presented persuasive messages
3. Visual models utilized in persuasive messages

Stealth Messages Embedded in Standard-Operating-Procedures

4. Course reviews
5. Course evaluations
6. Trainer evaluations
7. Recruiting of work-learning professionals
8. Training requests
9. Performance data
10. Workplace performance assistance
11. Learning needs analysis
12. Annual reporting to senior management

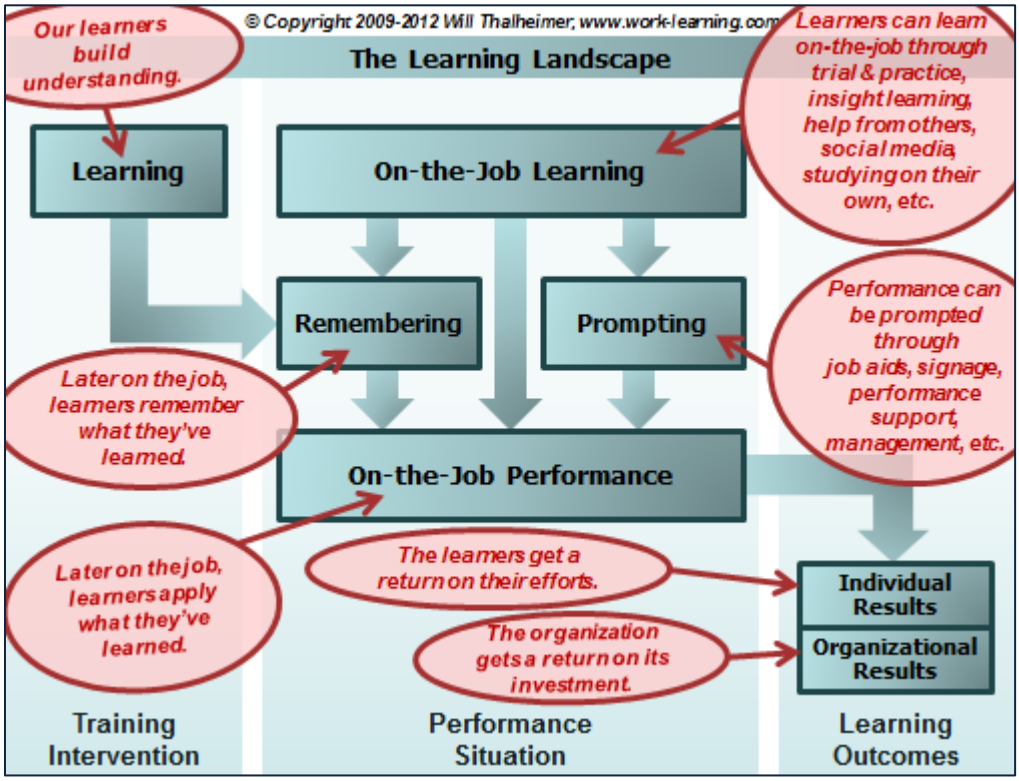
These labels may not be immediately understandable. I'll describe them in more depth after a brief introduction.

How to Educate Our Stakeholders

The first step in educating our stakeholders is figuring out what we want them to know. The major points from this book are a good starting place. We want them to know that:

- Training interventions are only one arrow in the work-learning quiver.
- We must build both understanding and remembering.
- Learning interventions require post-training supports to enable on-the-job application.
- Work-learning professionals and their counterparts on the business side must work together to maximize learning outcomes.
- On-the-job learning can be nurtured through intentional practices.
- Effective learning measurement is critical.
- Other concepts are critical as well—this is just a representative sample of some of the key points we need to convey.

The next chapter will go into more depth about how to convey some of these key concepts to our business partners. We will talk about how to utilize the Learning Landscape Model (depicted on the next page and described on YouTube at http://tinyurl.com/LearningLandscapeModel), the learning and forgetting curves, and other visual and conceptual metaphors to make our points. Because we'll go into depth in the next chapter, I will be brief here.



The Learning Landscape Model helps people understand the importance of remembering, prompting mechanisms, on-the-job learning, and learner results—all of which are often left unexamined. The Learning Landscape Model can also be used to highlight how important the business side is to learning transfer and on-the-job learning. It can also show why a full-source learning-measurement approach has benefits—in other words, it can take us beyond the over-simplified four-levels training-evaluation framework.

Again, to see more: http://tinyurl.com/LearningLandscapeModel

In general, visual models like the Learning Landscape can be powerful communicators. The key is to ensure that the model communicates the essence of what is true. Two warnings to aspiring visual-model creators—be very careful to communicate all the right messages, and realize how difficult it is to create a model that is both simple and true. I've seen organizations struggle mightily in both regards. Often they create inadequate models that convey untruths or muddled messages. Often they create more precise models that are too complicated to be easily understood.

Again, it might just be best to utilize the models from this book. They are inspired by the learning research, they've been vetted through years of use, and they were created by the sexiest guy in the work-learning industry—and they are available free, even more enticing I know.

The short answer is to find some models that work and then utilize them multiple times as perspective builders in your presentations to your stakeholders. Repetition has a way to support persuasion. And speaking of persuasion, it wouldn't hurt you to go reread Chapter 23 on persuasion from the perspective of educating your stakeholders. You might as well use every tool in your toolbox.

To summarize, we can use written persuasive messages, presented persuasive messages, and visual models to "educate" our stakeholders. Our stakeholders may include people within our work-learning team, our business partners within our organization, and our external customers.

We in the training field have an inherent tendency—damn if I haven't seen this over and over again—to believe in our power "to train." We seem to believe that our words, our stage presence, and our unique ability to use powerful metaphors can enlighten all who hear our clarion calls. This is one of our biggest failings—we believe too much in the power of our own words, as if we breathed Satin's breath with a pied-piper's tongue, as if we actually had the power to control the innocents we worked with.

You will fail if you use words and visuals alone. If you really want a chance to transform your organization, you must also use stealth messaging embedded in your organization's standard operating procedures.

Stealth Messaging in Standard Operating Procedures

Good people die. In my quarter-century-plus tenure in the work-learning field, I have seen many of the best minds of our generation destroyed by madness, become starving hysterical naked, dragging themselves through to the end of their careers, angel-headed hipsters burning to create on-the-job performance improvement, stifled permanently because they used only the siren's howl of words—they forgot or never knew the hidden power inherent in our standard operating procedures[3].

People we aim to persuade are more likely to send up shields to filter out our messages—they are more likely to shut the door on our arguments—when they know we are scheming to control their minds. To circumvent rejection, we need to do better than just knocking on the front door—we need to sing outside the open windows of their minds. By embedding our most critical messages in our standard operating procedures, we won't guarantee success, but we will give ourselves half a chance. Only by combining overt messaging and stealth messaging will we have a chance to succeed. Only by utilizing many stealth

[3] Apologies to Allen Ginsberg and his loyal fans if I have not fully captured the spirit from his classic poem, "Howl."

messaging techniques in concert will we maximize our ability to create meaningful change.

To repeat, here are some of our most common stealth-messaging opportunities, which we will cover in-depth one-by-one below:

1. Course reviews
2. Course evaluations
3. Trainer evaluations
4. Recruiting of work-learning professionals
5. Training requests
6. Performance data
7. Workplace performance assistance
8. Learning needs analysis
9. Annual reporting to senior management

Course Reviews

Because this concept of stealth messaging is probably foreign to many of you my dear readers, I'm going to jump right to an example to make this concrete.

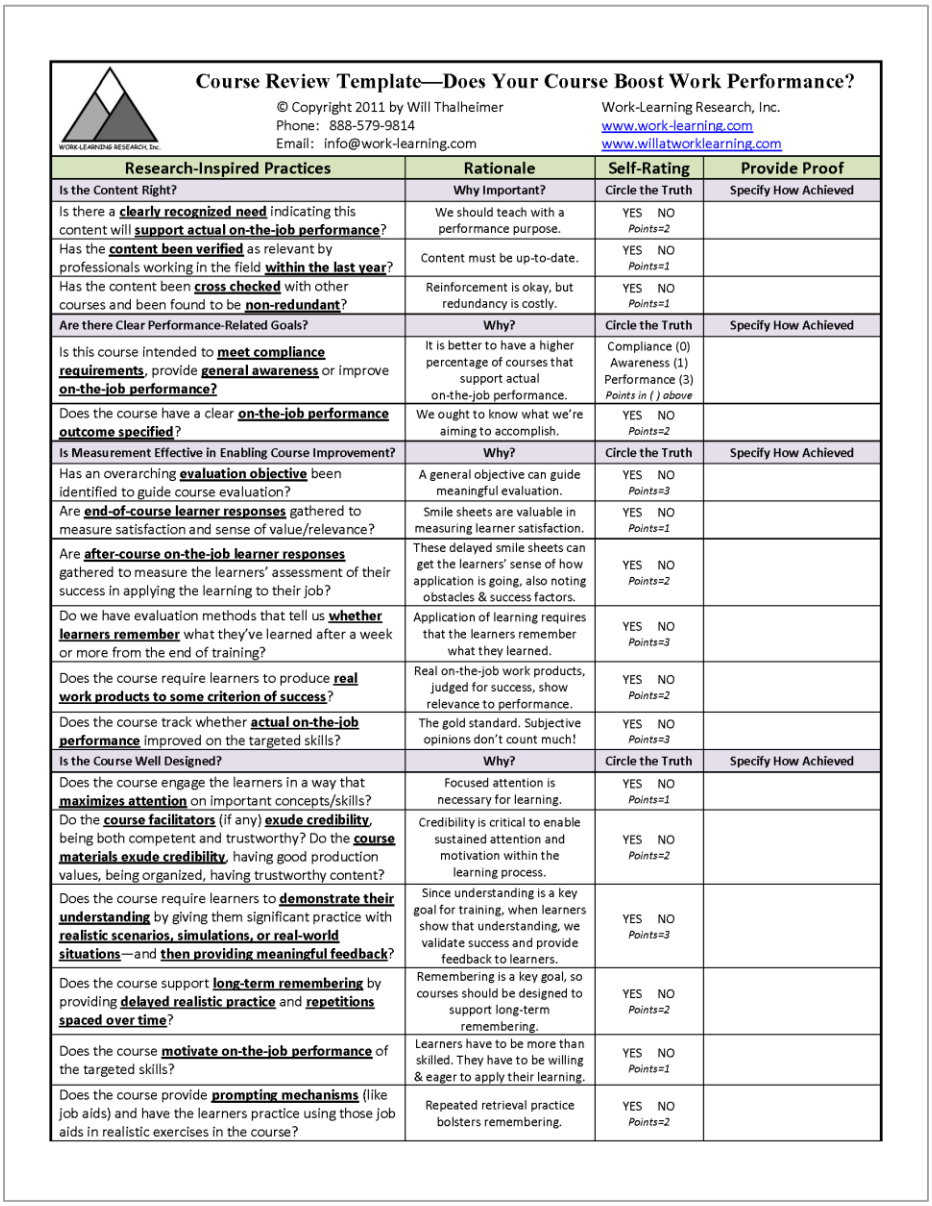
In our work creating and deploying training courses, we almost always use smile sheets to evaluate our results. Sometimes we do more formal evaluations by testing whether learners understand or remember key concepts. Sometimes we look to see whether our learners are actually utilizing the concepts in their work. In addition to these training "evaluations," sometimes we "review" our courses to determine if they are well-designed, to see what improvements we might make, or to judge the performance of those who created those courses. Many organizations have templates or a series of rubrics on which they assess their training courses.

Unfortunately, these course review rubrics are a gigantic missed opportunity because they don't include rubrics that get at some of the key factors that make training effective. Specifically, many of them miss the following:

- They don't focus on whether the course supports remembering.
- They don't ask whether the course utilizes prompting mechanisms.
- They don't look at whether learners' managers are asked to support learning application.
- They don't ask whether the learners are tracked after the training ends.
- They aren't, in general, based on research-based imperatives for learning.

The point is, if we are reviewing our courses, shouldn't our review method remind us of the most critical success factors? Of course it should.

I have created the Course Review Template for this purpose. You can get a copy of it by accessing the following link (http://tinyurl.com/CRT-Post). I recommend you do that now so you can see it at full size. It is two pages long. Here is what the first page looks like.



Course Review Template—Does Your Course Boost Work Performance?

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www.work-learning.com
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Research-Inspired Practices	Rationale	Self-Rating	Provide Proof
Is the Content Right?	**Why Important?**	**Circle the Truth**	**Specify How Achieved**
Is there a **clearly recognized need** indicating this content will **support actual on-the-job performance**?	We should teach with a performance purpose.	YES NO *Points=2*	
Has the **content been verified** as relevant by professionals working in the field **within the last year**?	Content must be up-to-date.	YES NO *Points=1*	
Has the content been **cross checked** with other courses and been found to be **non-redundant**?	Reinforcement is okay, but redundancy is costly.	YES NO *Points=1*	
Are there Clear Performance-Related Goals?	**Why?**	**Circle the Truth**	**Specify How Achieved**
Is this course intended to **meet compliance requirements**, provide **general awareness** or improve **on-the-job performance?**	It is better to have a higher percentage of courses that support actual on-the-job performance.	Compliance (0) Awareness (1) Performance (3) *Points in ( ) above*	
Does the course have a clear **on-the-job performance outcome specified**?	We ought to know what we're aiming to accomplish.	YES NO *Points=2*	
Is Measurement Effective in Enabling Course Improvement?	**Why?**	**Circle the Truth**	**Specify How Achieved**
Has an overarching **evaluation objective** been identified to guide course evaluation?	A general objective can guide meaningful evaluation.	YES NO *Points=3*	
Are **end-of-course learner responses** gathered to measure satisfaction and sense of value/relevance?	Smile sheets are valuable in measuring learner satisfaction.	YES NO *Points=1*	
Are **after-course on-the-job learner responses** gathered to measure the learners' assessment of their success in applying the learning to their job?	These delayed smile sheets can get the learners' sense of how application is going, also noting obstacles & success factors.	YES NO *Points=2*	
Do we have evaluation methods that tell us **whether learners remember** what they've learned after a week or more from the end of training?	Application of learning requires that the learners remember what they learned.	YES NO *Points=3*	
Does the course require learners to produce **real work products to some criterion of success**?	Real on-the-job work products, judged for success, show relevance to performance.	YES NO *Points=2*	
Does the course track whether **actual on-the-job performance** improved on the targeted skills?	The gold standard. Subjective opinions don't count much!	YES NO *Points=3*	
Is the Course Well Designed?	**Why?**	**Circle the Truth**	**Specify How Achieved**
Does the course engage the learners in a way that **maximizes attention** on important concepts/skills?	Focused attention is necessary for learning.	YES NO *Points=1*	
Do the **course facilitators** (if any) **exude credibility**, being both competent and trustworthy? Do the **course materials exude credibility**, having good production values, being organized, having trustworthy content?	Credibility is critical to enable sustained attention and motivation within the learning process.	YES NO *Points=2*	
Does the course require learners to **demonstrate their understanding** by giving them significant practice with **realistic scenarios, simulations, or real-world situations**—and **then providing meaningful feedback**?	Since understanding is a key goal for training, when learners show that understanding, we validate success and provide feedback to learners.	YES NO *Points=3*	
Does the course support **long-term remembering** by providing **delayed realistic practice** and **repetitions spaced over time**?	Remembering is a key goal, so courses should be designed to support long-term remembering.	YES NO *Points=2*	
Does the course **motivate on-the-job performance** of the targeted skills?	Learners have to be more than skilled. They have to be willing & eager to apply their learning.	YES NO *Points=1*	
Does the course provide **prompting mechanisms** (like job aids) and have the learners practice using those job aids in realistic exercises in the course?	Repeated retrieval practice bolsters remembering.	YES NO *Points=2*	

I know you can't read it very well here—I just wanted to show you the format.

Below is a close up of the top of the form:

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Course Review Template—Does Your Course Boost Work Performance?

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Phone: 888-579-9814
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Work-Learning Research, Inc.
www.work-learning.com
www.willatworklearning.com

Research-Inspired Practices	Rationale	Self-Rating	Provide Proof
Is the Content Right?	**Why Important?**	**Circle the Truth**	**Specify How Achieved**
Is there a **clearly recognized need** indicating this content will **support actual on-the-job performance**?	We should teach with a performance purpose.	YES NO *Points=2*	
Has the **content been verified** as relevant by professionals working in the field **within the last year**?	Content must be up-to-date.	YES NO *Points=1*	
Has the content been **cross checked** with other courses and been found to be **non-redundant**?	Reinforcement is okay, but redundancy is costly.	YES NO *Points=1*	
Are there Clear Performance-Related Goals?	**Why?**	**Circle the Truth**	**Specify How Achieved**
Is this course intended to **meet compliance requirements**, provide **general awareness** or improve **on-the-job performance?**	It is better to have a higher percentage of courses that support actual on-the-job performance.	Compliance (0) Awareness (1) Performance (3) *Points in ( ) above*	
Does the course have a clear **on-the-job performance outcome specified**?	We ought to know what we're aiming to accomplish.	YES NO *Points=2*	
Is Measurement Effective in Enabling Course Improvement?	**Why?**	**Circle the Truth**	**Specify How Achieved**
Has an overarching **evaluation objective** been identified to guide course evaluation?	A general objective can guide meaningful evaluation.	YES NO *Points=3*	
Are **end-of-course learner responses** gathered to **performance** improved on the targeted skills?	Smile sheets are valuable in opinions don't count much!	YES NO *Points=3*	
Is the Course Well Designed?	**Why?**	**Circle the Truth**	**Specify How Achieved**
Does the course engage the learners in a way that **maximizes attention** on important concepts/skills?	Focused attention is necessary for learning.	YES NO *Points=1*	
Do the **course facilitators** (if any) **exude credibility**, being both competent and trustworthy? Do the **course materials exude credibility**, having good production values, being organized, having trustworthy content?	Credibility is critical to enable sustained attention and motivation within the learning process.	YES NO *Points=2*	
Does the course require learners to **demonstrate their understanding** by giving them significant practice with **realistic scenarios, simulations, or real-world situations**—and **then providing meaningful feedback**?	Since understanding is a key goal for training, when learners show that understanding, we validate success and provide feedback to learners.	YES NO *Points=3*	
Does the course support **long-term remembering** by providing **delayed realistic practice** and **repetitions spaced over time**?	Remembering is a key goal, so courses should be designed to support long-term remembering.	YES NO *Points=2*	
Does the course **motivate on-the-job performance** of the targeted skills?	Learners have to be more than skilled. They have to be willing & eager to apply their learning.	YES NO *Points=1*	
Does the course provide **prompting mechanisms** (like job aids) and have the learners practice using those job aids in realistic exercises in the course?	Repeated retrieval practice bolsters remembering.	YES NO *Points=2*	

The rubrics on the left side highlight important concepts that we know—based on research and experience—to be critical to the success of a training course. For example, note that the template asks, "Does the course have a clear **on-the-job performance outcome specified**?" We know that many training courses fail to specify performance outcomes at all—they only focus on what learners should know. By failing in this regard, the instructional designers often focus only on learning objectives, not on how to improve on-the-job performance. Without performance outcomes in mind, trainers focus on teaching content, not on ensuring that their learners are ready to perform on the job.

In the section above, the Course Review Template highlights many of the most important design issues, including some that are typically ignored. For example, one of the rubrics asks, "Does the course support **long-term remembering** by providing **delayed realistic practice** and **repetitions spaced over time**?" Another asks, "Does the course provide **prompting mechanisms** (like job aids) and have the learners practice using those job aids in realistic exercises in the course?" Again, by explicitly asking ourselves well-targeted questions we make it more likely that we won't forget to do things we want to do. By having our stakeholders utilize a tool like the Course Review Template, we send them stealth messages about what is important.

Note that the major headers in the Course Review Template highlight key themes that we want to convey in regard to our training courses. Here are the headers:

- Is the Content Right?
- Are there Clear Performance-Related Goals?
- Is Measurement Effective in Enabling Course Improvement?
- Is the Course Well Designed?
- Is the Learning Well-Integrated into the Workplace?

By having these major themes, we send some critical messages to our stakeholders:

- The content has to be correct, up-to-date, and relevant.
- The course should be focused on on-the-job performance—not just knowledge transfer.
- We ought to measure our course outcomes in such a way that we can improve our learning interventions.
- There are important—sometimes overlooked—means by which we can improve our training courses.
- We are not done when we finish teaching a course—indeed, there is much that needs to be done to ensure that the learning is applied to the job.

These themes and the many micro-messages each rubric conveys provide another way to reinforce the correct mental models of how learning works to create on-the-job performance.

By using some kind of course-review process that conveys important stealth messages, we are providing reinforcement in our battle to change the hearts and minds of our stakeholders.

Course reviews are only the first example of many ways in which we can use stealth messaging. Before I turn to other methods, let me comment on the term "stealth messaging." Many of you will wonder if the word "stealth" is really a

precise descriptor. After all, to be stealthy implies attempts to remain hidden or undetected. We are not hiding our rubrics, so why is the word "stealth" appropriate? I like it here because while we are not hiding the messages, we are being stealthy in stamping authority onto rubrics that have—after all—been chosen by fragile and imperfect human beings, despite our terrific skin tone and radiant charisma. We are being stealthy in that while this one message is front and center, our stakeholders may not see that it is just one of a multitude of ways that we are intentionally working to get our whole network to understand work learning and on-the-job performance.

Course Evaluations

Course reviews are only the first example of many opportunities to utilize stealth messaging. Formal course evaluations—though similar and sometimes overlapping—are a second way we can send stealth messages to help everyone understand learning at a deeper level.

Most courses utilize only smile sheets—learner opinions at the end of training—to evaluate course outcomes. The messages conveyed in a smile-sheet-only world are as follows:

- Learners know how valuable the content will be to them.
- Learners know how well designed the learning was.
- Learners know how much they learned.
- Learners know how much they will remember.
- Learners don't need on-the-job support to apply their learning.

At least several of these messages are false or misleading. Learners may sometimes be good judges of the perceived value, but they are notoriously poor at knowing what they don't know, knowing how much repetition and practice they'll need to remember, and knowing how likely they will be to apply what they've learned on the job. For these reasons, if we only do smile sheets for our course evaluations; we will send our stakeholders the wrong messages.

It's good to also utilize delayed smile sheets—smile sheets delivered after learners have been back on the job for a week or more. Delayed smile sheets send a clear message that it's what happens on the job that really matters. In addition, delayed smile sheets can ask about learner's success factors and obstacles in applying the learning—thus sending a message that the organization needs to support learning application.

By using delayed tests of remembering, we not only get a good idea of whether our training intervention actually worked to support remembering, and we not only provide our learners with feedback; but we also send a message that remembering is important—not just attendance in a training class. Of course,

"tests of remembering" will have to be designed in such a way that they feel natural, engaging, and relevant. Well-designed scenario-based questions, simulations, and real-world tasks will fit these requirements.

While remembering is on the causal pathway between training and on-the-job performance, evaluating actual on-the-job performance is even better. For example, if we teach a course on coaching to managers, by evaluating their subsequent performance as coaches, we not only get great feedback on our success, but we also send the message that it's performance that counts. Let's say for example that we ask the managers' direct reports to rate their coaching performance one month after the coaching course ends. By surveying the direct reports, we send a message to their managers—our learners—that (a) their coaching performance matters, (b) we expect them to put in an effort to improve their coaching, and (c) that others in the organization will be paying attention. We also send a message to the managers' managers that they should also be focused on coaching outcomes. We also send a message to the managers' direct reports that the organization wants to provide them with better coaching—and that they can help by supporting their managers in their efforts to improve.

We can evaluate a number of other things with the intention of sending powerful messages to our organizations and customers. We can specifically evaluate whether learners' managers are supporting learning application. We can determine whether prompting mechanisms are well used. We can look at on-the-job learning.

Training evaluation provides such a powerful leverage point—and yet by only focusing on smile sheets, we not only don't use the lever, we use it to send faulty messages to our organizational stakeholders. We must do much, much better.

Trainer Evaluations

Another of our standard operating procedures is our trainer evaluations. In most work-learning organizations we evaluate our trainers to give them feedback to improve. Unfortunately, we rarely focus on all the leverage points that make trainers successful.

Here are the typical rubrics deployed on trainer evaluations:

1. Deep knowledge of subject matter?
2. Invite questions?
3. Answer questions effectively?
4. Exhibit charisma—have ability to maintain attention?
5. Exhibit professional demeanor?
6. Exhibit energy and enthusiasm?
7. Effective use of whiteboards and flipcharts?
8. Effective use of presentation software (e.g., PowerPoint, Keynote)?

9. Effective us of body dynamics and articulation?
10. Messages adapted to audience?
11. Maintained eye contact?
12. Well-organized?
13. Utilize a call-to-action?
14. Main points fully supported?
15. Reinforced main points?

These were all drawn from actual trainer evaluation forms, and are representative of the most common rubrics in use today. What do they have in common? Take a look at them again.

First, they are all reasonable things we expect from a competent trainer. Second, they are all focused on the classroom experience itself.

Before I go on, let me add that some of the items above are better rubrics than others—having a clearer standard of performance. For example, it will be easier for us to decide if a person maintained eye contact or asked for a call to action than it will be for us to know whether they made effective use of body dynamics, whatever that is.

But here's the key point about the list above. While the items above are reasonably important, they miss some of the most critical factors in making training effective.

Missing:

1. Do the trainers utilize learning methods that ensure that learners are actually able to understand the main points?
2. Do the trainers utilize techniques that ensure that learners are motivated to apply what they've learned later on the job?
3. Do the trainers provide sufficient realistic practice to ensure understanding and support remembering?
4. Is effective feedback provided on practice?
5. Are the main concepts repeated and spaced over time?
6. Do the trainers have a current understanding of how the concepts are actually used by professionals on the job?
7. Do the trainers enlist the learners' managers to aid in supporting the training and in supporting on-the-job application after training?
8. Do the trainers follow-up with their learners to find out their level of success in applying the learning? Do the trainers learn the success factors that enabled successful application of the learning? Do the trainers learn the most common obstacles to on-the-job application of the learning?
9. Do the trainers employ effective evaluation techniques—for example including delayed smile sheets and tests of remembering—to ensure that learning is creating beneficial outcomes?

As you surely can see, while our trainer evaluations focus on some important learning factors, they miss more than—let me estimate—three-quarters of the factors that can make training effective in creating on-the-job performance.

You read that right. I said that most of our trainer evaluations miss three-quarters or more of the factors that make training effective. And so, when we rely on our inadequate trainer evaluations we are sending the wrong message overall. We are essentially saying, "You oh mighty trainer will be successful if you master entertainment, the appearance of relevance, and the coverage of key knowledge points."

Egads! Is this all there is?

We should know better.

Recruiting of Work-Learning Professionals

When we hire trainers, instructional designers, e-learning developers, training managers, chief learning officers and other work-learning professionals we have a profound effect on the kind of results we will get. Yes, we can attempt to change a person's mindset once we have them onboard, but the old management axiom has a truth we should not ignore. You can hire hard, and manage easy or hire easy and manage hard.

Unfortunately, we usually bring people into our organizations to fulfill a need. "I need someone who can use Captivate, SimWriter, and PowerPoint." "I need someone who has taught soft skills to those in my target audience."

We have a terrible time hiring trainers because when we evaluate them for hiring we focus almost exclusively on their platform skills or their subject-matter expertise—ignoring all the other things that make them effective. See the discussion just above on trainer evaluation to see the extent of the damage we cause ourselves.

We hire instructional designers and e-learning developers primarily for their ability to get stuff out the door quickly. We want to know what authoring tools they know, how much experience they have with the types of topics we teach (systems training, soft skills, compliance, etc.). Sure, we ask about their schooling, but unfortunately their schooling has probably left them without a full appreciation for the learning landscape.

The bottom line here is that we should be asking for more. Here are a few examples, though this is not a complete list:

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1. **"In your past work, what are all the things you did to ensure that your learners were able to fully understand the concepts that you taught?"**
    - Here we listen for the following (among other things):
        i. We provided spaced practice.
        ii. We provided examples and non-examples.
        iii. We provided worked examples.
        iv. We provided multiple opportunities for realistic retrieval practice with feedback.
        v. We gave practice on boundary conditions.
        vi. We enlist the aid of our learners' prior knowledge.
        vii. We surfaced their prior misconceptions.
        viii. We showed the whole picture, taught the parts, then taught and reinforced the whole.

2. **"What kind of things do you do to ensure long-term remembering?"**
    - Here we listen for the following (among other things):
        i. We provided spaced repetitions and spaced practice.
        ii. We taught concepts and skills utilizing realistic contexts.
        iii. We provided multiple realistic retrieval-practice attempts.
        iv. After feedback, we provided additional retrieval practice on concepts that were misunderstood.
        v. We utilized variable practice.
        vi. We reinforced key concepts and skills after learners returned to the job.

3. **"What kind of learning practices do you recommend for ensuring that training produces the best outcomes?"**
    - Here we listen for the following (among other things):
        i. Ensure that we utilize research-based remembering techniques, especially providing retrieval practice on realistic on-the-job situations, and spacing our learning and practice over time.
        ii. Enlist learners' managers in supporting on-the-job application of learning.
        iii. Provide prompting mechanisms like job aids instead of training for situations when memory is likely to be faulty or when prompting is more likely to be effective. Also, provide prompting mechanisms for use in training to bolster training application
        iv. Set triggers for action, to promote spontaneous remembering on the job.

This list could obviously go on and on, but you get the point. We ought to be recruiting work-learning professionals into our organizations who have mindsets about how to maximize learning results.

We want to start out with our new folks by sending the right messages about what is important. We also want to reinforce the right messages with our current staff. By providing recruiting guidelines, hiring rubrics and the like, our current stable of work-learning professionals—especially those who are asked to interview or evaluate resumes—will be reminded once again of the importance of a full-factor learning approach, one that goes way above and beyond the traditional training approach.

Training Requests

Another standard operating procedure we can turn to our advantage is the ubiquitous training request. Almost all the training organizations I've worked with over the years are inundated with training requests from throughout the larger organization. Senior management wants a new leadership-development program. IT needs a course on JavaScript. Sales needs a negotiation course. Customer service needs a course on coaching.

By the hundreds these requests flow in—and we respond. Like the lower-rank of wolves, we tuck our tails and bow our heads to our superiors. In the next chapter I'll make a less-than-humble case for us to stop groveling like little Uriah Heeps, as in Dickens famous book *David Copperfield*. But for now, let me just emphasize that these training requests are a huge missed opportunity to send stealth messages to the organization about how training can work to maximize on-the-job performance.

When we get a training request we ought to send the following stealth messages:

1. Training is not always the answer.
2. We need to look at the causes of the issue.
3. Even if training can play a role, training is not enough.
4. Learners' managers can play a critical role.
5. What can the business side contribute to bolster learning application?
6. Etcetera.

Because the next chapter goes into such depth on this topic, I'm going to end here. The key point to remember is that you ought to be using training requests as an opportunity for stealth messaging.

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Performance Data

Real-world performance data is often more compelling than any work-learning messaging we can create. I recently did consulting for a food manufacturing company that wanted to improve its safety outcomes. When I walked the floor of the factory, what I saw were giant whiteboards at every manufacturing line showing the production numbers in various incarnations of speed, quality, and efficiency. There was not one single mention of safety. When I sat in on their team meetings, safety was mentioned, but production numbers were emphasized more powerfully. When I talked privately and confidentially with the line workers and their supervisors, the number one priority that management emphasized was "getting pounds out the door." Safety was said to be job #1, but production was the message that permeated every breathing moment in the factory.

We as work-learning professionals have to be a lot more assertive about utilizing real work data to drive performance. If we teach a coaching class to customer-service supervisors or systems experts, we ought to ask their folks how the coaches are doing—we ought to gather some simple data about their actual coaching performance. If we teach a course on innovation—especially if the course is part of a strategic imperative for our organization—we ought to get some sort of idea of whether the course actually has produced innovation.

I've recently been involved helping a large organization rethink its onboarding program. As part of this effort I suggested a redesign of the onboarding measurement system. In the new approach, we are tying the results to outcomes that recent onboarding research shows are critical—things like bonding between the new hires and the old guard, proactive behavior of the new hires, supervisor actions, among many other things. The idea is to give everybody feedback on the success of the program in reaching its goals. It also helps send critical messages to the various stakeholders. The new hires themselves get sent the message that they have to be proactive, they have to be assertive in networking, and they have to take charge of their own career progression. New hires' supervisors are sent the message that they have to create an environment where the new hires are welcome, where the very first day the new hires' tools and equipment are ready to go, where new hires need to bond with the team, where new hires need to quickly be challenged with interesting work and given the support they need to succeed in their tasks. The onboarding orientation facilitators are sent the message that it's not enough to create an enjoyable experience, but the new hires must bond with one another, they must be inoculated against the normal frustrations of any new organization, and they must follow through with proactive onboarding activities for the first year of their tenures. By tracking the new hires through validated survey questions during their first year on the job and getting survey responses from the supervisors as well, we can send very clear messages about how things are going and where things need to be improved.

So for example, in the organization that is doing this onboarding work, too many supervisors of the new hires just don't understand that they have a critical role to play in onboarding. First by asking them survey questions about onboarding and then by sharing the results with them, we are sending them a message of how they can make a very real difference in the success of their new employees.
To summarize this section, on-the-job performance data provides an incredibly powerful stealth message to everyone. It's all about the work outcomes!

Workplace Performance Assistance

The next stealth-messaging opportunity I'm going to discuss is workplace performance assistance, or performance assistance for short. What are we known for, as workplace learning-and-performance professionals? We're known for training. While many of aspire to be performance consultants, we end up just aspiring. One of the reasons for this—besides the fact that those on the business side actually know what they're doing better than we can know it—is that our training departments mostly do training. Let me repeat that to be clear. We're known for training because, pretty much, that's what we do.

By doing training and only training, our stealth message to the rest of the organization is that what we do is training. While the cause of this horrid state of affairs may be a mystery, there is remarkably something we can do about it. For example, perhaps we can offer other non-training interventions. Eureka!

Now, of course, for some organizations, training is not all we do. We do organizational development, performance consulting, and talent development—among other things. Still, too many of us are viewed primarily as the training folks. The fact that this is still the case 15-plus years after Gaines and Robinson wrote their seminal book on performance consulting and 30-plus years after Gilbert's classic book on engineering worthy performance should make us wonder what we are missing.

Here in this book I don't have the time to explore all the intricacies of organizational development and performance consulting, although I hope the watchful reader has noted their presence in the ideas put forth throughout. For now, I will offer the concept of performance assistance—one of the most leverageable options for those of us who are seen as work-learning professionals.

Performance assistance can take many forms but at its core involves helping people do their jobs better—without relying solely on training interventions. Some examples of performance assistance:

1. Helping teams have better meetings.

2. Helping groups be more creative.

3. Helping coaches better support learning.
4. Facilitating better large group processes.
5. Supporting strategic/tactical planning.
6. Supporting project success through action learning.

To be able to provide support in these areas, we are going to have to invite ourselves in somehow. The next section on Learning Needs Analysis is one way to procure an invitation. The next chapter on working with our business partners will give us another way—developing trusting relationships that will enable us to suggest these types of performance assistance interventions. Finally, the best way to get invited to do these interventions is to develop a track record. If you can create one successful performance-assistance intervention, the word will get around—and you'll be able to tout your success when sharing the opportunity with your own stakeholders.

Here's how this might work. Let's say that meeting management in your company's marketing department has risen to the level of crisis. Perhaps the senior manager there has come to you asking that you offer a training course on how to run meetings. Suppose further that this manager actually trusts you—perhaps he is your husband or your wife's brother. You convince him that one of your folks has some expertise on meeting management and that instead of starting with training, you recommend that this person sit in four or five meetings in the department to observe. This is all acceptable and the person observes five meetings, introduced as a person from the workplace learning-and-performance department who is an expert in meeting management. From this observation you, this meeting expert, and managers in the marketing department get together to look at different strategies. You recommend that instead of training, that each of the marketing teams gets a brief introduction to a meeting-process template and have the meeting expert take each team through it and sit in the meetings to provide feedback, guidance, and troubleshooting. This intervention improves the ratings of the meetings, shortens meeting time, and freshens the breath of the participants. With this success, you decide to approach the finance department, operations, and research-and-development, where data suggests obvious needs for meeting improvement. As reputation spreads, the graphics department, the IT department, and even senior management request a similar intervention tailored to their needs. Voila, you have success!

By providing performance assistance, you as the work-learning team will send a provocative stealth message—that you are not just training developers, you are not just order takers, that training is not always the default decision, that a partnership with the work-learning folks is actually preferable than a series of handshake and handoff events.

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Learning Needs Analysis

One of the reasons that our organizations rely on us as order takers is that we are rarely proactive in reaching out to assess learning needs and recommending learning interventions. There are several ways we can approach this task.

Some organizations do yearly surveys of the whole organization, asking employees what they want to learn. Other organizations look at yearly organizational culture survey results and make best-guesses on what is needed. Some organizations look specifically at how employees rate their managers to determine what leadership-development offerings are warranted. While these and similar approaches can be useful, the closer we get to the on-the-ground reality, the better. Ultimately, it is far better to develop a deep and sustained partnership with the different units in the organization to fully understand their needs. We can still utilize surveys as a method to gather data, but we should go beyond surveying and develop two-way communication between ourselves and key individuals at various levels in those units we aim to support. The more we truly understand their on-the-ground reality, the better we can understand and meet their needs. The more time we spend working with our business partners, the more trust will develop and the more power we will have to make positive change.

One thing to keep in mind is that there can be different levels of commitment to learning-needs assessment. For senior managers, we might provide executive-level gray-haired coaches who job shadow and provide recommendations based on real-world observations. For project teams, we may be able to sit in a few meetings and briefly skim work outputs—if problems have become apparent. The bottom line is that we won't always be able to spend as much time, or utilize as many resources, as we might like.

You'll note that I used the term "Learning Needs Analysis" instead of "Training Needs Analysis." The reason for this is simple—we can also make a difference by providing simple on-the-job methods for learning. For example, many teams find a real benefit from spending five minutes at the end of their meetings debriefing how to improve the meeting approach for next time. By taking five minutes for a meeting review, the members of a team learn how to create better meetings.

Instead of getting into the nuts and bolts of how to do a learning needs analysis—which is really beyond the scope of this chapter and is discussed more in the next chapter—let me emphasize the main point. By doing periodic learning needs analyses we send the message to our business partners that we are more than order takers, that learning can be leveraged in the workplace not just in training, and that we as work-learning professionals do understand the business and are available as trusted partners in the name of improved bottom-line performance.

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Annual Reporting to Senior Management

In our organizations, it often falls to the chief learning officer—the CLO—or a similarly-ranked learning executive, to make a report to senior management on the performance of the workplace-learning department. We trek from our village to see the Emperor, a rare and wondrous opportunity, our chance solidify our bona fides, our chance to send a few critical messages. What do we do with this profound opportunity? All too often, we report how many people have been trained, smile-sheet ratings from those courses, and the cost of that training.

Where are our CLO schools in all this? Note to CLO schools: Deliver failing grades to all your students who recommend this butts-in-seats, scores-on-paper, dollars-spent-on-training approach to work-learning messaging. Egads people! This is exactly the wrong messaging to send to our senior leaders.

Let me be kind for a moment. Most learning executives are not as dense as all this. Many talk about how their training supports this or that strategic initiative, or meets this or that performance gap—and that is all good. But this rare-metal opportunity should be put through a crucible of reason and import, and not just walked through as if all is well. All is not well in our training-centric approach.

Our enlightened CLO's—our erudite learning executives—will figure out how to send some other critical messages. For example:

1. **Types of Training Courses**
   The percentage of our training courses that are intended:
   a. To fulfill compliance requirements
   b. To provide general awareness
   c. To support improved on-the-job performance

   The idea here is that (i) these three types of training should be treated differently, and (ii) general awareness courses should be limited to as few as possible, and (iii) that compliance courses should be evaluated to see if they are really needed and to determine whether they might be better conceived and designed to actually support on-the-job performance. We send these messages to our senior management so that they know that not all training courses are created equal—and specifically that for courses to have real impact they need to be specially designed to support long-term remembering and have on-the-job follow-up. We want our senior leaders to know that compliance training and awareness training have very little effect on performance.

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2. **Learning Measurements**
   Not all of our training courses or other learning interventions require the most rigorous level of learning measurement, but some do. We shouldn't have a one-size-fits-all measurement mindset and we shouldn't let our senior leaders have such a mindset either. Thus, our report to senior management should include some differentiation of the types of measurement we are doing. For example, we might use the following breakdown for our training courses, based on the type of training intent:

   a. Compliance
      i. **Legal Vetting.** Percentage of compliances courses that have been vetted by the law department as definitely needed.
      ii. **Signed Acknowledgement.** Percentage of targeted learners who have agreed that they understand and will abide by the compliance rules.

   b. Awareness
      i. **Report Understanding.** Percentage of learners who report that they understand the concepts/skills taught.
      ii. **Demonstrate Understanding.** Percentage of learners who definitively demonstrate their understanding of the concepts/skills taught.
      iii. **Demonstrate Remembered Understanding.** Percentage of learners who definitively demonstrate remembering for the concepts/skills taught—10 days or more after the training ends.

   c. On-the-Job Performance
      i. **Report Understanding.** Percentage of learners who report that they understand the concepts/skills taught.
      ii. **Demonstrate Understanding.** Percentage of learners who definitively demonstrate their understanding of the concepts/skills taught.
      iii. **Demonstrate Ability.** Percentage of learners who definitively demonstrate their ability to make realistic job-related decisions or take actions in realistic job-related tasks.
      iv. **Demonstrate Remembered Understanding.** Percentage of learners who definitively demonstrate remembering for the concepts/skills taught—10 days or more after the training ends.
      v. **Demonstrate Remembered Ability.** Percentage of learners who definitively demonstrate their ability to make realistic job-related decisions or take actions in

realistic job-related tasks—10 days or more after the training ends.

vi. **Demonstrate On-the-Job Performance.** Percentage of learners who have definitively improved their on-the-job performance—10 to 30 days or more after the training ends.

vii. **Demonstrate Long-Term On-the-Job Performance.** Percentage of learners who have definitively improved their on-the-job performance—two or more months after the training ends.

viii. **Etcetera.**

These various categories send the message that there are different types of learning measurements that we can employ, that some are very important and some are less important, and that the most important one's are the ones we should be doing more often. Particularly for the different types of measurement for On-the-Job Performance, the many varieties of learning measurement there send several important messages, including the following: (a) there are critical differences between reporting understanding and demonstrating it, (b) there are differences between showing understanding and showing an actual ability to perform, and (c) there are differences between short-term and long-term learning that can only be measured by focusing on long-term remembering.

3. **Training Focused on Performance**
The percentage of our trainees who reported that the course they took prepared them to know "*what to do when*"—as opposed to just providing awareness of concepts/principles. The more performance-focused courses the better, so we show senior management how we are moving toward fewer awareness-only and compliance-only courses.

4. **After-Training Follow-Through**
The percentage of our trainees who reported—three weeks after the training ended—that they had actually applied what they learned to their job in a substantial manner.
   a. The reasons for their success in being able/willing to apply what they learned.
   b. The reasons for their lack of success—the obstacles they faced in being able/willing to apply what they learned.
   c. How much their supervisor and/or work team has supported their efforts in applying the learning.

By doing the above, we send a message to senior management that after-training assessments are normal and important, that it's what happens after training that matters, and that training success depends

not only on work-learning professionals but also the business/line management and workplace support as well.

5. **Training Request Percentages**
   The percentage of training requests that were (a) granted as a training-only deliverable, (b) granted with workplace-support augmentation (for example, providing training but also changing the performance-management requirements to support the end-goal), (c) delivered as workplace support with little/no training element), (d) rejected.
   By keeping track of what happens to the training requests that are made, and sharing this information with senior management, we send the message that training is not always the answer and that performance improvement depends on workplace management and practices. We also again send the message that training-alone is not nearly as effective as training with on-the-job support for performance.

6. **Workplace Performance-Assistance Engagements**
   In addition to reporting on training engagements, we ought to report on our performance-assistance engagements. This obviously will send the message that we do more than training.

7. **Support for On-the-Job Learning**
   We also ought to report on our efforts to specifically support workers in our organization in learning on their own and from each other. Specifically, we could report on how well we are tracking and supporting the following types of on-the-job learning:
   a. Creativity and insight learning.
   b. Coaching-supported learning.
   c. Mentoring-supported learning.
   d. Job-rotation learning.
   e. Learning on one's own.
   f. Learning from doing.

These are just some examples—and certainly you wise reader can generate other ideas of things you can report to our senior-manager stakeholders; to send critical stealth messages that educate and open opportunities to further help our learners and our organizations.

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Chapter Summary

This chapter focused on change and on some of the key opportunities we have to help promote positive change in our organizations.

Here are some of the concepts we covered:

1. As workplace learning-and-performance professionals we have an incredible need to be successful in pushing for change.

2. We talked about how to use the soft-power of stakeholder management, as well as using hard-power when it is required.

3. We looked at stakeholder mapping, and particularly the idea that our goal is not necessarily to get everyone to agree, but to get people to move toward agreement and support—and away from resistance and active blocking.

4. We discussed how exhortations and grand visions are not enough to change long-held mindsets—that while we need to "educate," we need to go beyond education to alternative approaches.

5. We talked about how we can use stealth messaging in our standard operating procedures—in the practices we are already using—to utilize multiple channels to change long-held mindsets.

6. Specifically, we looked at the following leverage points—standard operating procedures we use now—that could be modified to send more effective performance-improvement messages, to help our organizations move toward a focus on performance and effective work-learning.

    i. Course reviews
    ii. Course evaluations
    iii. Trainer evaluations
    iv. Recruiting of work-learning professionals
    v. Training requests
    vi. Performance data
    vii. Workplace performance assistance
    viii. Learning needs analysis
    ix. Annual reporting to senior management

Again, let me emphasize that this has been a rough draft. It was not copy-edited and it is not in its final version. I make it available to get a conversation going and to provide value for my clients and the work-learning field.

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Thanks for your interest!

I welcome your comments and suggestions and am available to help you take these concepts further and integrate them successfully within your organization.

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