

The Learning & Performance Link

The Case for Performance Toolkits

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GoodPractice



The case for performance toolkits

Introduction

1. The learning and performance link

- 1.1 The informal vs. formal learning battle
- 1.2 The problem with formal learning on its own
- 1.3 Needs of the employee
- 1.4 The learning and performance link
- 1.5 Where is the focus right now?

2. Toolkits and how they can help

- 2.1 What is a toolkit?
- 2.2 How does it support deep dive, explore and just-in-time?
- 2.3 Benefits to the organisation

3. The practicalities

- 3.1 Failure points
- 3.2 Our experience – what works
- 3.3. It's not just about our content ...
- 3.4 Implementing and launching

About GoodPractice

Introduction

The world of the learning and development professional is changing. Rapidly evolving technology and the introduction of a new generation to the workplace is challenging the way organisations have facilitated learning in the past.

This white paper sets out the case for organisations to increase the use of on-demand resources, such as online toolkits, as a way of improving the performance of employees.

The paper explores the link between learning and performance, the power of informal learning, the different styles and levels of learning that employees adopt and the factors that influence such styles.

Along the way, the paper highlights the difficulties that can be experienced when launching an on-demand learning resource and how these can be overcome.

1. The learning and performance link

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Learning and performance are often treated as separate entities. An organisation's learning and development department will look after learning events, leadership courses and coaching programmes. The focus will be on learning objectives rather than directly on improved performance standards. At GoodPractice, however, we've always thought of learning and performance as two sides of the same coin. Improved performance comes from improved knowledge and skills. New knowledge and skills are impossible to attain without some form of learning. The exact mechanism for delivering that learning is the source of much debate in the world of employee development.

1.1 The informal vs. formal learning battle

In recent years, the learning and development community has turned its attention to the nebulous subject of informal learning. Proponents of informal learning use statistics showing just how much learning takes place informally, and hold it out as the missing piece of the training puzzle. Its detractors deride it as a fad, driven solely by new technology, and continue to focus on more formal learning interventions. The truth is both simpler and more complex, but the debate often misses the point: what matters isn't which form of learning is best, but which is the most suitable in the situation, in order to improve performance.

The difference between formal and informal learning can be summed up in the following way:

Formal Learning	VS.	Informal Learning
Developed by professionals	VS.	Developed by anyone
Modules last hours or longer	VS.	Short and sharp
Delivered by experts	VS.	Delivered by anyone
Not always relevant today	VS.	Just-in-time and relevant
Pushed and scheduled	VS.	Pulled and real time
Controlled and inflexible	VS.	Dynamic and ad hoc

Informal learning is nothing new; it's always taken place in organisations because when we don't know how to do something, our first response is to ask a knowledgeable colleague. However, technology facilitates informal learning – it makes it happen more quickly. Before the telephone, informal learning took place face-to-face or via letters. After the phone, it was just a call away. Now, it can be facilitated over internal IT networks or even the internet.

Formal learning will always be needed for organisations to function effectively, but there are some problems with formal learning that need to be addressed through informal means.

1. The learning and performance link

1.2 The problem with formal learning on its own

Two key factors have a detrimental influence on the effectiveness of formal learning interventions such as a workshop.

The first is the fallibility of the human memory. We've known for over 100 years, through the work of Hermann Ebbinghaus, that there is a fairly predictable pattern to how much information is lost over time after we learn something new. This is less of a problem if we are using the information straight away, because using it helps the transition to long-term memory. However, it does pose a problem if we learn something and do not use it for some time after.

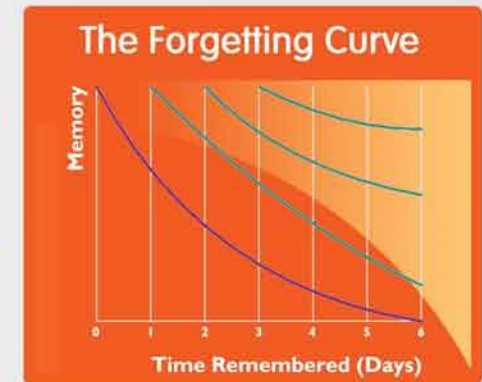
To demonstrate this, let's imagine that Tim is a promising employee, whose manager believes would benefit from running a project as part of his ongoing development. Further, in Tim's organisation, a training course on project management is run on a relatively regular basis. In this scenario, there are broadly three potential outcomes:

- **Outcome one:** Tim attends the project management course and some weeks (or months) later he is given the opportunity to use what he has learned. In this situation, Tim has to rely either upon his memory or on notes that he has in order to use what he learned at the workshop.
- **Outcome two:** Tim attends the project management course immediately before he starts his project. This is the ideal situation, and the memory problem should not be a factor, but as we shall see, there are other obstacles that Tim will have to overcome.
- **Outcome three:** Tim needs to start his project immediately but the next course isn't for a few weeks (or months). Or work pressures are such that he can't be released to attend the course. These scenarios are all too often encountered in large organisations which have logistical problems in delivering the right workshop at the right time for each employee.

The second problem with formal learning on its own is that it has a defined end point. This has a number of knock-on effects which leave Tim at a disadvantage unless he can access informal learning channels.

Tim will likely come across situations that were not covered by the workshop – after all, how many of us have been on a workshop that gave us all the answers? In addition, Tim's notes from the workshop never update, never develop over time on the back of the latest thinking and never help in situations that the workshop didn't cover. In fact, if Tim is only using project management techniques he learned on a course five (ten?) years ago, he's probably not managing the project very well. The workshop Tim attends will most likely cover just one approach to project management. This approach will work better for some projects than others, but there is no universal best approach to project management. There are alternatives available, but if they're not covered by the course, how does Tim find out about them?

To cover these gaps, Tim will either rely on his own gut instinct and experience, or on informal learning channels, such as advice from his manager, advice from his colleagues, a subject matter expert or mentor, the internet or, as we shall see shortly, an online resource such as a toolkit.



1. The learning and performance link

1.3 Needs of the employee

Whenever faced with a task, problem or challenge, we tackle it using one of three modes of learning:

- Just-in-time
- Explore
- Deep dive

In each of these three modes, there are a number of different channels we can use to get the information and support we need:

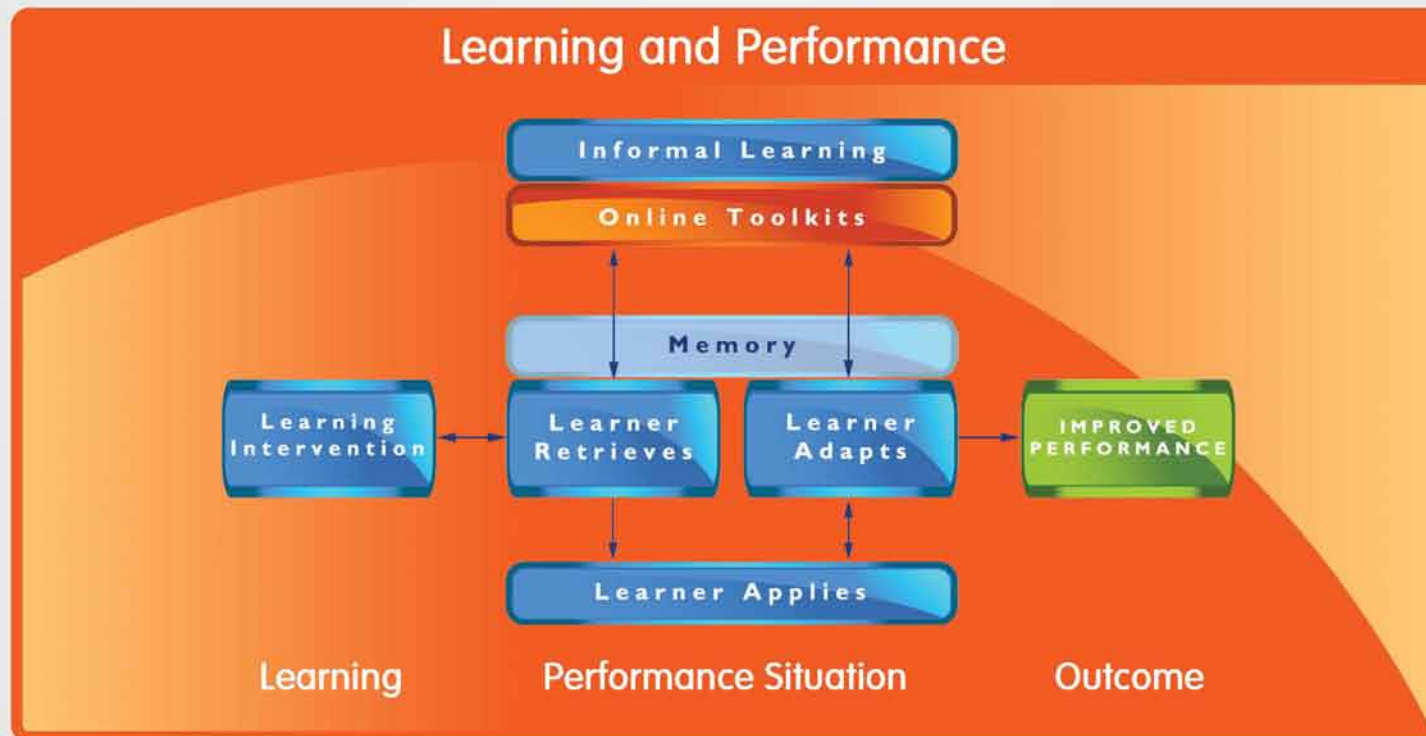
Level of engagement	Description	Learning Channels
Just-in-time	Employee seeks help and support at the time they need it to deal with an unfamiliar task, challenge or problem.	Ask a colleague Review notes from a course Web search Short-term coaching (from manager or other)
Explore	Employee recognises that the issue justifies investing some time to investigating the task, challenge or problem. This activity is regarded as research or investigation work.	Web search Library Video E-learning Seek out a subject matter expert Short workshop
Deep Dive	Employee recognises that they need time away from work to immerse him/herself in 'learning mode' to acquire new skills and perspectives.	Structured learning experience: Courses Qualifications E-learning, assessment and testing Longer term coaching/mentoring



1. The learning and performance link

1.4 The learning and performance link

Will Thalheimer, a respected learning and development commentator, has developed a model that shows where learning fits into a performance situation. Tim, once again, is a useful example to help describe the model in detail. After Tim has attended the project management workshop, he will eventually face a situation where he needs to apply what he has learned. To do this, he will normally rely on his memory to retrieve information and skills and then adapt these to the circumstances he finds himself in. Depending on how good Tim's memory is, and how effective the learning intervention was, the outcome from this situation will be better performance from Tim than would have resulted had there not been any learning intervention.



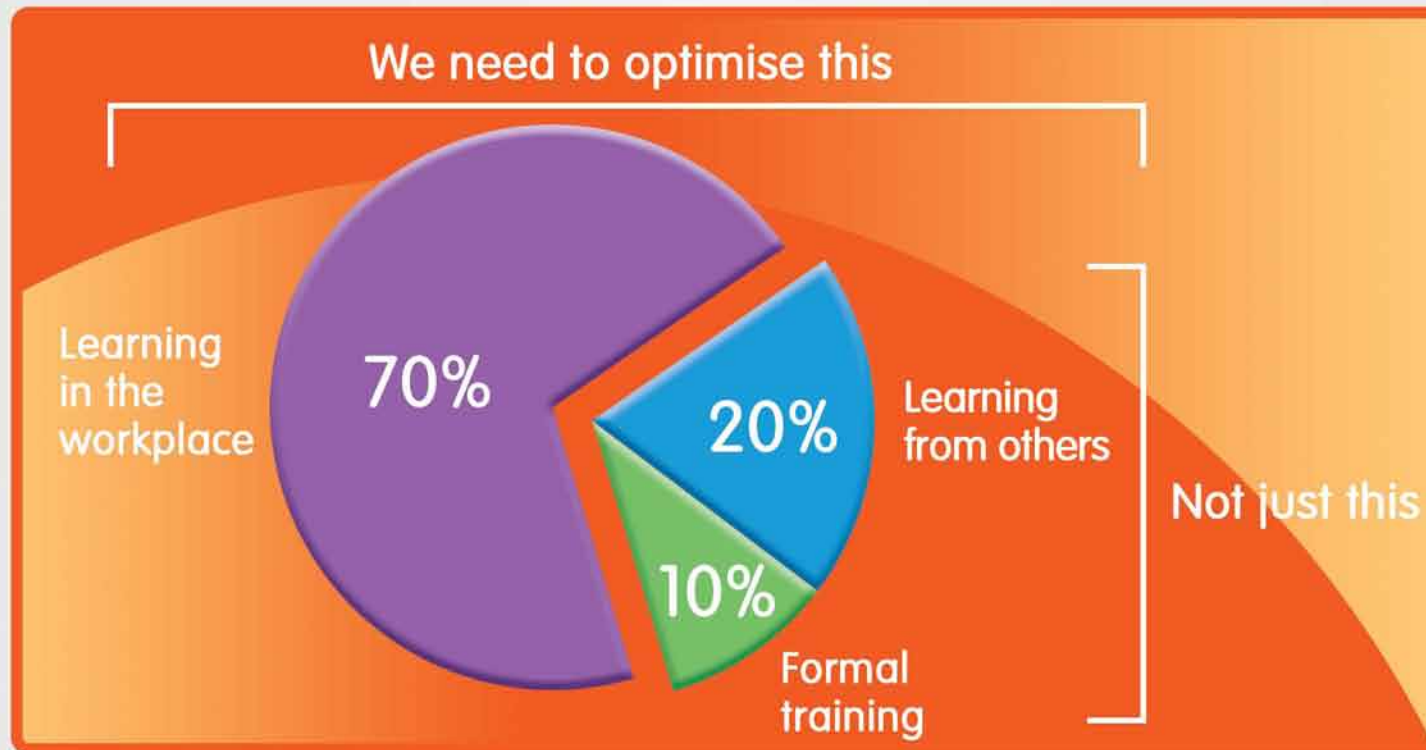
In real life performance situations, however, the employee hasn't always attended a learning intervention beforehand. The learning intervention hasn't always given the employee the knowledge and skills they need to tackle the situation they face now. This is where informal learning comes in, to bridge the gap and help the employee out. In the absence of a formal learning option, organisations need to give their employees something they can use to help them cut down the time it takes to get the right information and advice.

1. The learning and performance link

1.5 Where is the focus right now?

Given the importance of informal learning in the performance situation, many commentators in the learning and performance field, such as Jay Cross, have highlighted organisations' attention and spending disparity.

Depending on the nature of the organisation, learning in the workplace, i.e. informal learning, can account for as much as 70% of the learning activity that takes place at work. Learning through others, e.g. coaching, mentoring and networks and formal training, make up the balance. Despite this, the focus and spend in most organisations is on the 30%!

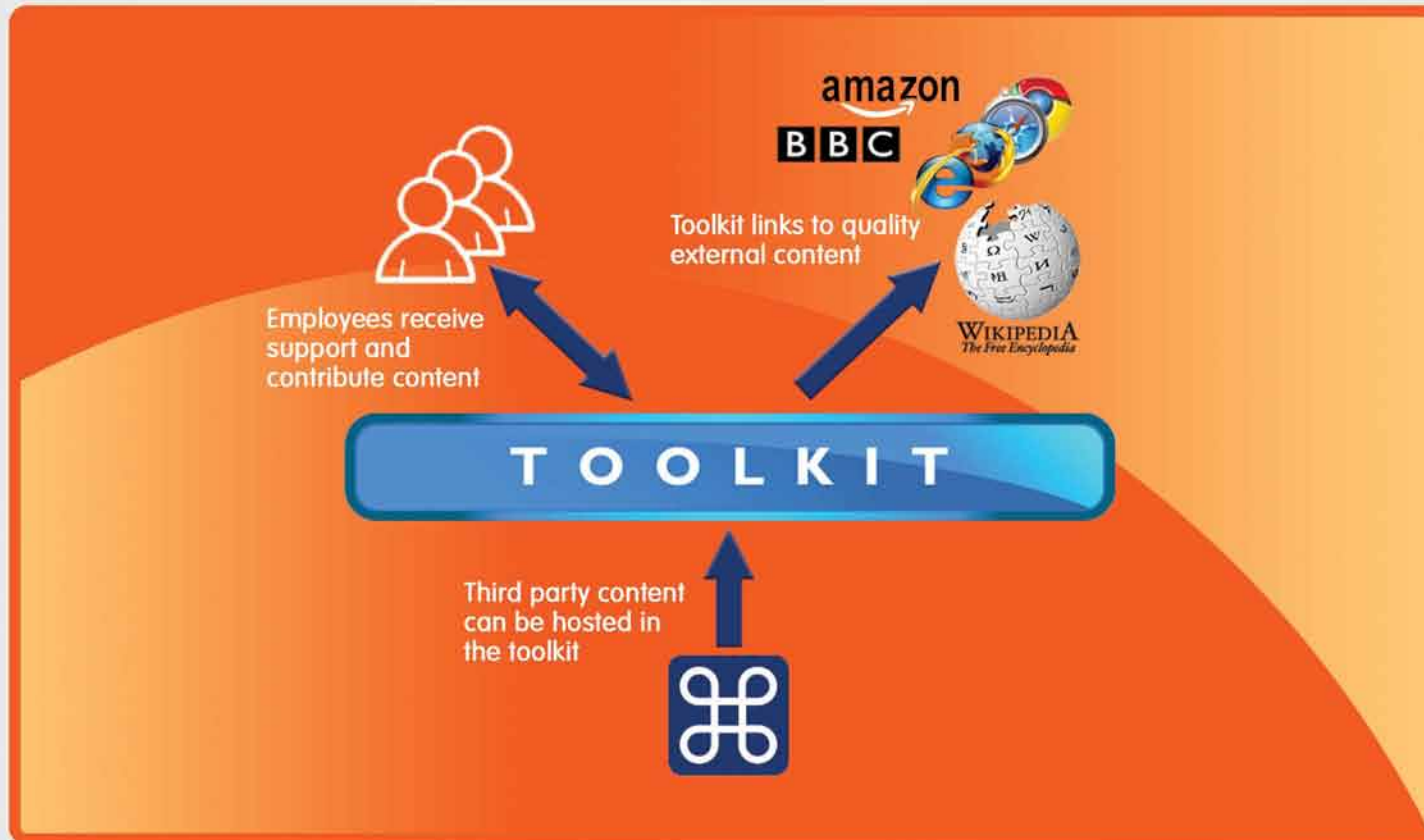


Many learning departments buy into the illusion of control they have over their workforce's learning, but the reality is that informal learning is happening. Employees are adopting new approaches, ideas and skills from colleagues, networks and information sources outside the confines of official learning programmes. Simply ignoring informal learning can mean that the learning occurs with no guidance or quality control, resulting in a huge hidden cost implication. Toolkits are not being suggested as a replacement to formal training, not as a panacea to cure all informal learning's pitfalls, but as a necessary additive that the learning department can and should use to influence learning.

2. Toolkits and how they can help

2.1 What is a toolkit?

A common question we are asked is: "What is a toolkit and how does it differ from other forms of learning, particularly e-learning?" In a nutshell, a toolkit is the first place a user seeks content to help them perform more effectively. Content can be generated by a provider (such as GoodPractice), the users themselves, or through links to third party resources.



Those of us who love semantics might very well ask: "What's the difference between a toolkit and a portal?" The answer is "nothing really", though a true portal simply links the user to other resources, while our toolkits also provide a great deal of relevant content.

2. Toolkits and how they can help

2.2 How does it support deep dive, explore and just-in-time?

We've had experience over a number of years of using toolkits in a wide range of different organisations and we've found that they can be successfully used to support all three modes of learning.

The key to their impact is that they cut down the time it takes to access the information and guidance they need. Sometimes, the toolkit will have all the information they need, which is the case for just-in-time learning. At other times, the toolkit will help solve the problems encountered in formal approaches, such as the out-of-date notes and lack of new ideas.

Level of engagement	Description	Toolkit use
Just-in-time	User seeks help and support at the time they need it to deal with an unfamiliar task, challenge or problem.	An ideal use for a toolkit, as it provides quick access to a trusted source. Often the employee won't consider this learning; rather they will consider it 'getting the job done'.
Explore	User recognises that the issue justifies investing some time to investigating the task, challenge or problem. This activity is regarded as work.	As above, a toolkit can provide quick, practical tips and tricks but also provide the employee with more in-depth articles for reading and reflection. Again, the employee may not consider this 'learning', but might think of it as 'research' or 'investigation'.
Deep Dive	User recognises that they need time away from work to immerse themselves in 'learning mode' to acquire new skills and perspectives.	Toolkits can support more formal learning methods by providing employees with ongoing support when they return to the workplace. There's also the opportunity for employees to continue to network with each other and discuss ideas after a formal course via features such as forums.



2. Toolkits and how they can help

2.3 Benefits to the organisation

Toolkits are one of the fastest growing areas of learning and development in the UK. In part, this is because they are easy to implement and effective in delivering results. The business case is compelling; a toolkit:

- reduces the time required to achieve competency
- provides quick, quality responses to ever-changing performance requirements
- makes knowledge available across the organisation and can be used as a means of knowledge transfer
- improves the knowledge transfer and retention provided by formal training
- improves employee engagement
- reduces training costs

Toolkits work because they provide on-demand solutions that meet individual users' needs. When accessing a toolkit, the employee is already motivated to look for a solution, so the learning is self-directed, with the employee selecting the information and tools they need to resolve the challenges they face at that particular time.

3. The practicalities

3.1 Failure points

In many organisations, the concept of a toolkit or online portal isn't a new one, and we're often asked how to ensure that the toolkit is accessed as part of the working practices of employees. This is usually as a result of a previous poor experience with online resources. It is the 'gym membership' syndrome of buying membership to the gym and, despite best intentions, finding out in a year's time that you've only been twice.

Over the last ten years we've refined a systems model that has identified four key potential failure points that need to be managed in order to ensure success. When implementing a toolkit or portal the four failure points are:

- employees don't know that it's there (or have forgotten)
- employees can't find it easily
- employees can't find something relevant to their task, challenge or problem easily
- the content doesn't help the employees with their task, challenge or problem

If the toolkit doesn't provide what the employees need at each of these key points then it loses their engagement and attention. The employee will simply decide to adopt a different and, from their perception, easier means of solving the problem.

3.2 Our experience – what works

At GoodPractice, we work with organisations to help minimise the number of users lost at each of these failure points. We've found over the years that this can be achieved by focusing on five key areas:

1. **Strong early communications** – so the workforce knows what the benefits of the toolkit are, how it can help them, and where they can find it.
2. **Regular updates and follow-up communication** – providing employees with a reason to visit the site, whether that is because of new, potentially useful, content or a reminder of how the toolkit can help them in regular activities, such as performance management.
3. **A prominent access point** – providing employees with the ability to access the toolkit from an online location they visit often. This may be a prominent place on the organisation's intranet, and/or an easy method to help employees save the toolkit to their favourites.
4. **Keeping it simple** – making sure the toolkit is easy to navigate for those with varying degrees of familiarity with the internet, so they can access content quickly.
5. **Content that works** – the content and resources have to give the learner a positive experience and make them feel that they have moved on. This means the toolkit must consist of content that provides the employee with the knowledge they need, but also content that helps them in the performance situation – content that helps them to do what they need to do. In fact, the closer to the frontline, the more practical the content should be.

Getting these things right dramatically increases the chances of a toolkit gaining widespread adoption in an organisation.

3. The practicalities

3.3. It's not just about our content ...

Providing your employees with access to a wide range of high quality, practical advice and tools on key management and leadership challenges improves performance and saves time. We keep our content up-to-date, ensuring that the natural evolution of good practice is reflected in our toolkits. However, no third-party supplier can provide your organisation with everything its managers and leaders need (though we do try!).

As well as providing helpful resources, a toolkit gets more traction with employees if it changes over time to reflect the culture and strengths of the organisation and its people. Making it easy for learning professionals and subject matter experts to add in new content enables efficient knowledge sharing. Forums (or discussion boards) encourage the sharing of ideas across the organisation, while a message centre will allow communication from the centre to be cascaded quickly and effectively. As the general workforce becomes more familiar with social media, there will be an increased expectation that these tools are available to share knowledge, seek answers and work effectively. To be effective, learning professionals will need to overcome their fear of losing control of the learning environment and embrace new learning approaches – after all, if the result is improved performance, it doesn't matter whether the substantive contribution was delivered in a workshop or in a forum post.

3.4 Implementing and launching

Setting up a toolkit within your organisation should be easy. With a range of off-the-shelf toolkits available, there is no reason why you can't plug a toolkit into your intranet and be up and running in a week.

In reality, we know that it can take time for organisations to get the right people together to implement a toolkit, which is why it helps to have experts on hand to make the process as smooth as possible. Speaking the language of the IT department as well as the HR department helps smooth the process.

Above all, taking a pro-active approach generates dividends. Taking a *Field of Dreams* 'If you build it, they will come' approach takes much longer and often never creates sufficient momentum. Being proactive doesn't mean a lot of work, and GoodPractice is more than happy to help along the way.

GoodPractice toolkits feature a range of tools and resources that support your staff – whether it is finding information, brushing up on previously learned skills or finding out that they didn't know what they needed to know! GoodPractice offers fully customised toolkits and can advise you on the design, launch and ongoing promotion of your toolkit, thus ensuring the maximum return on your investment – without creating a lot of extra work for your HR team.

- Toolkits for Managers: for all staff up to and including middle management.
- Toolkits for Leaders: for senior staff and emerging talent.
- Toolkits for HR: for HR and L&D Professionals.

Many of our 200-strong client base have more than one toolkit to empower, develop and support the widest range of employees within their organisation.



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