TRAINING TODAY

CHICAGOLAND CHAPTER ASTD WORKPLACE LEARNING & PERFORMANCE

SUMMER 2006

A MAGAZINE FOR WORKPLACE LEARNING AND PERFORMANCE PROFESSIONALS IN THE CHICAGOLAND AREA

Letter from the Editor

Wikis, Blogs, And Pods, Oh My!

It's CCASTD's biggest event of the year! On October 18 and 19, CCASTD will host a 2-day Conference & Expo on *The Human Side of Technology*. Don't miss this chance to learn about wikis, blogs, pods and much more!

According to the event's organizer, Trish Uhl, "The entire event is based on the nine areas of expertise in the ASTD Competency Model. Each presentation will address one or more area of expertise, and contain a mention of technologies that can be used in support of those disciplines."

There will be plenty of information on learning initiatives, project management, and coaching so don't worry if you're not a computer geek or geekette. "It's all about how technology - learning technologies - should be used to enhance initiatives, not replace the primary focus of them," says Trish.

The articles in this issue will give you a taste of what's to come at the conference. All of the authors will be presenting at the event. Many of them will provide additional information on the topics in their articles. Visit the CCASTD Web site, *www.ccastd.org/annual_event.html*, for more information about the presenters, their topics, and the event schedule. See you there!

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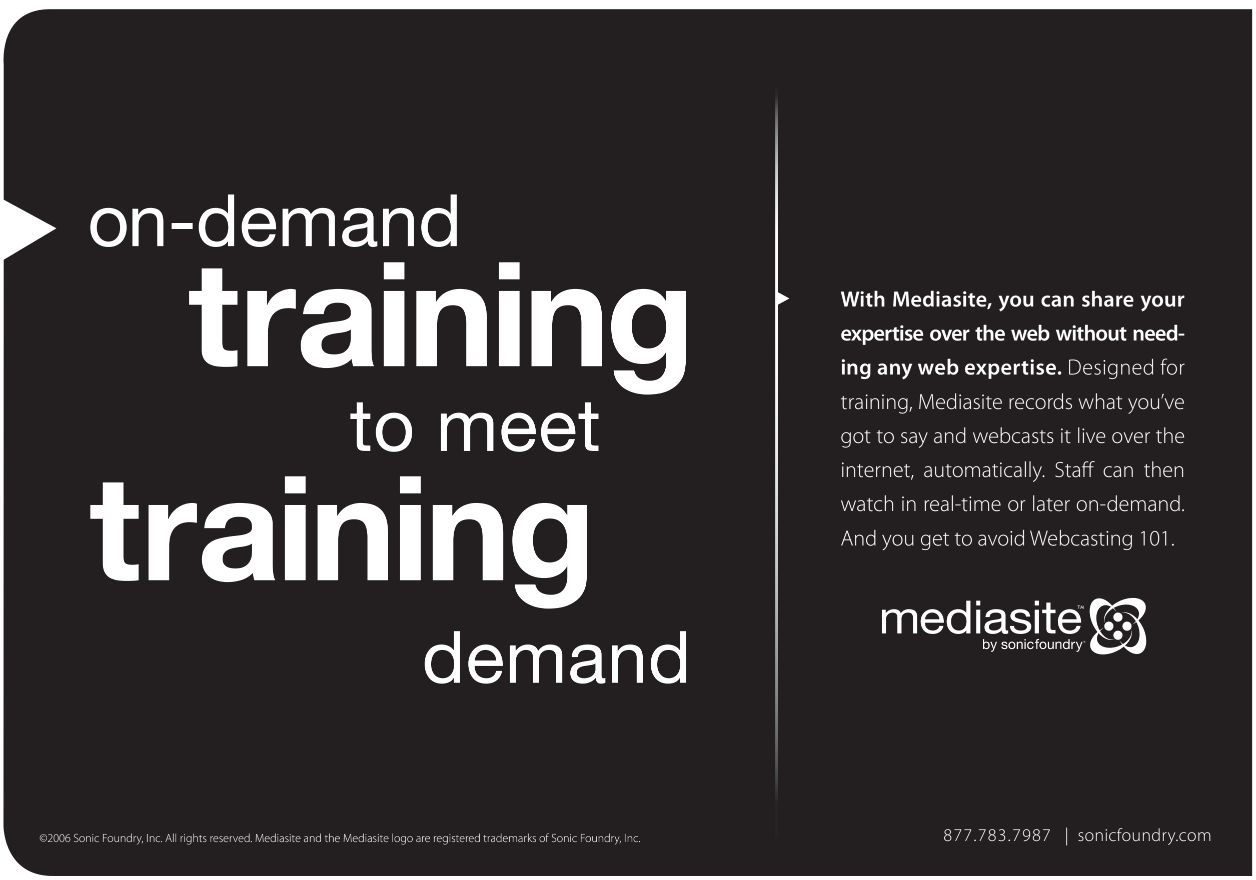
Addendum: True to these authors' focus on e-communication, many of their references are websites rather than print sources. As a result, this issue departs from the standard reference format to preserve the original intent of the authors. We recognize that this may create difficulty in finding original sources and offer our apologies for any inconvenience this may cause.



Scenario Planning and E-Learning

By Kathleen Iverson

Scenario planning is an interactive model for decision making that is widely used in risk management, marketing, scientific analysis and investment strategy. Scenario planning provides a way to uncover possible outcomes in an uncertain future, and helps with the formulation of responses to them.

At the heart of scenario planning are *scenarios*, or stories, about the way the world might turn out. These scenarios are alternative outcomes in light of various situations that might arise. Scenario learning allows us to "experience" the future and hone our reflexes so that we react more quickly and efficiently to change.

Components of Scenario Planning
There are four primary components of scenario planning:

1. *End State* - the vision of the scenario outcome.
2. *Plot* - the story that describes the characters and events that comprise a scenario.
3. *Driving Forces* - the key factors that might move in different directions and have significant effects scenarios.
4. *Logic* – the rationale for why a particular end state might unfold.

Implementing Scenario Planning
In the rapidly changing e-learning environment, scenario planning can accelerate the strategic planning process and uncover unrealized opportunity. Let's look at how the process might be applied to this issue using an outcome matrix and the development of a series of stories based on the components of the matrix (Wilson, 1994).

Step #1 - Identify the Focal Issue or Decision. What is the main issue you want to explore regarding e-learning? Depending on the maturity of your organization with respect to e-learning, you may want to ask a broad question such as "What is the future role of e-learning in our organization?" or a specific one such as "What is the best process to follow to convert traditional training to an electronic delivery?"

Step #2 - Identify Driving Forces. Identify the driving forces that effect e-learning in your organization. These might include social dynamics, organizational culture, human capital, economics, politics, or technology.

Step #3 - Create a Scenario Matrix. Create a matrix of related driving forces on two orthogonal axes. Use the matrix of crossed axes to describe four different quadrants of uncertainty. Each of these four areas is a logical future that you can explore.

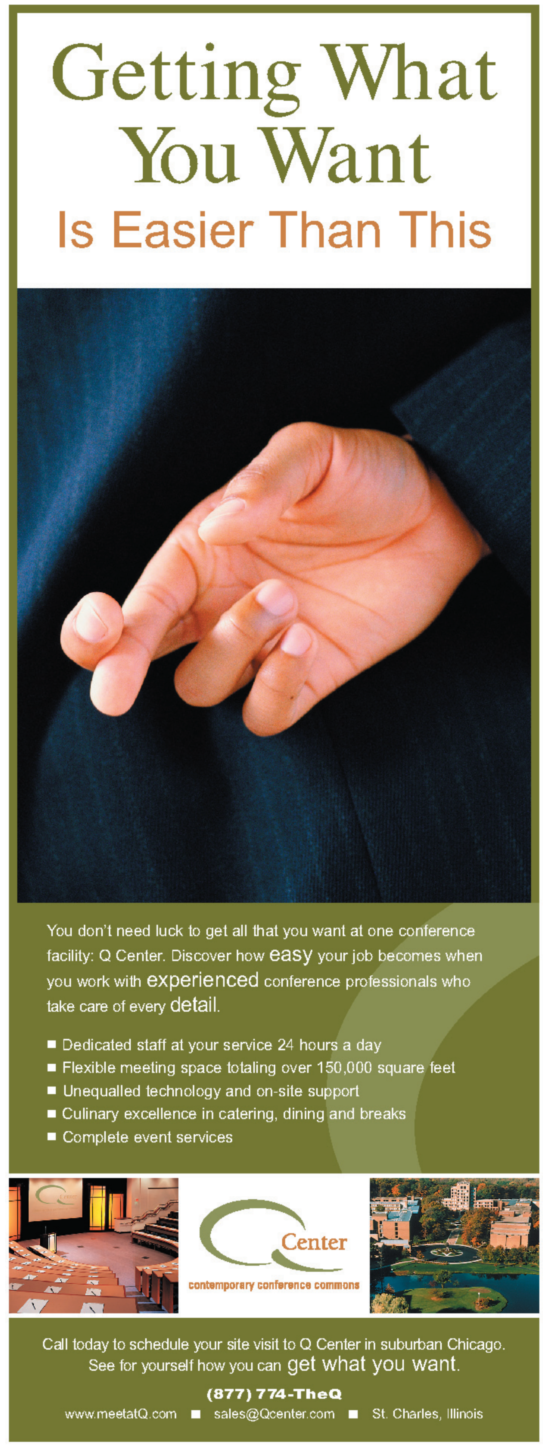
Step #4 - Write and Name Your Scenarios. Identify key themes that are strategically relevant and organize possible outcomes around them. For example, a company concerned with a future conversion to e-learning might develop these four scenarios:

- Total Control
- Steeped in Tradition: Instructor-led Training is our Creed
- Vendor Partnership
- Training on the Back Burner

Continue the process by expanding each of these scenarios into at least four additional scenarios. Consider variations, combinations, and blends using the driving forces as "characters" in the stories. For example, create scenarios for a traditional delivery method with in-house development, for electronic delivery with total outsourcing of development, etc.

Step #5 - Evaluate Your Scenarios. Determine if the scenarios you've developed are valuable for your planning exercise. Consider four criteria for the assessment: relevance, internal consistency, archetype and sustainability (Fahey, 2000).

- *Relevance.* Do the scenarios connect with the mental maps and key concerns of those who will use them (e.g., senior executives, middle managers, etc.)?
- *Consistency.* Are the scenarios internally consistent? If your scenario predicts both a highly educated work pool and a tremendous need for basic skills training, there is conflict and your scenario is not consistent.
- *Archetypal.* Are the scenarios unique or do they need to be combined? Each one should describe a different future rather than variations on one theme.
- *Sustainability.* Does the scenario include an equilibrium state in which the system might exist for some time, or does it depict a highly transient environment?



Step #6 - Identify Strategic Issues and Develop an Implementation Plan. The most important components of your stories for strategic planning purposes are those that hold true across scenarios. Robust plans are based on situations that might occur in any outcome; decisions that make sense in only one story may limit your ability to change.

Will Your Plan Be Successful?

The question to ask at the end of a scenario planning exercise is - "Will the plan be a success or a bust?" To help with the assessment, use a business model framework (Chan & Mauborgne, 2000):

- *Utility*: Is there a compelling reason for trainees to participate in the-learning experience?
- *Cos*t: Will the cost of the program make it an attractive proposition to both internal and external customers?
- *Business Model*: Can the company profitably deliver the new learning solution to its constituents?
- *Adoption Hurdles*: Have barriers to acceptance from employees, top management, customers or other constituents been eliminated?

These four simple questions will provide insight into whether your plans will be appealing, profitable, and sustainable. A "no" answer to any one of the questions doesn't mean that your proposal must be abandoned. Rather it means that you will move toward implementation with the knowledge that some key constituents might veto your idea. This gives you strength; you can anticipate their arguments and be prepared with a logical defense.

Scenario planning allows your organization to look into the future of e-learning and not only predict new developments, but also experience them. It is a simple, yet powerful, tool that can help you prepare for the future of e-learning.

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Kathleen Iverson is an Associate Professor in the Graduate Program in Training and Development at Roosevelt University. She holds a Ph.D. from Loyola University Chicago in Training and Organization Development with a minor in Quantitative Research Methods. Dr. Iverson is the author of E Learning Games: Interactive Strategies for Digital Delivery. *Roosevelt University is a platinum sponsor of* The Human Side of Technology Conference.

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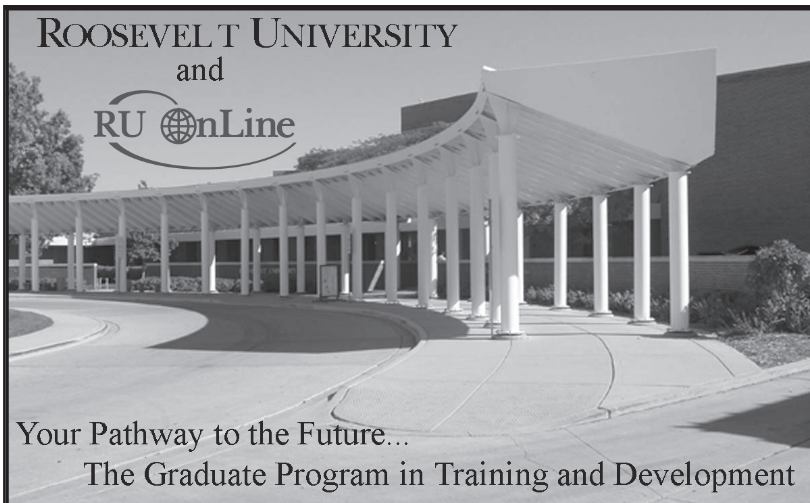

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Digital Storytelling: Will it Work?

Denning, Steve. 20 March 2004. "Can we use blogs, wikis, IM or RSS feeds to tell our story?" Online posting. Technology Blogs & Knowledge. http://www.stevedenning.com

by Stephen Denning

I had a mild complaint the other day. Someone said, "Your site has a daily update but it isn't like most blogs. You don't talk about yourself."

My respondent is right of course. Personal revelation is not the objective of the blog on my website. Instead, the aim is to look at business news through the lens of storytelling, and to understand the scale and diversity of its impact. It's not to talk about me. There are other parts of the website where you can learn about me, find out where I'm speaking, and see what I think about a wide variety of topics.

Nevertheless, this comment provides an opportunity to reflect on the prospect of using technology to tell stories, or share knowledge, in an organizational context. So let's take a quick look at blogs, wikis, instant messaging, and RSS feeds.

BLOGS

Blog is short for Web Log. These websites use a dated format for comments that are usually updated frequently.

In principle, blogs are a great way to tell one's story with unlimited space and a potentially infinite audience. But, I'm skeptical about whether they are likely to make a significant contribution to sharing knowledge in an organizational setting. Most blogs that I've visited tend towards the "Dear Diary" variety with a tinge of self-indulgence, narcissism, and self-absorption.

Blogs are great as an outlet for personal expression, are certainly cheaper than a psychiatrist, and perhaps may help one find geographically dispersed soul mates. They've also proven their power in politics by linking together geographically dispersed individuals of similar persuasion to effect political change (e.g. in pulling down Trent Lott and pushing up Howard Dean in 2004). But for knowledge management in an organization? I'm not sure.

I find it hard to see how the unconstrained outpourings on blogs will be compatible with "The Apprentice"-like environments of big corporations in which most people work. In these situations, the task is to appear as cooperative as possible, while avoiding being the victim of the next round of downsizing or outsourcing.

Some would argue that there is a small category of blogs which become, for a period at least, the authoritative source on a particular subject, e.g. some questionable factoid of a political campaign. Could this kind of blog become useful in a corporate context? There was in fact a case study in the Harvard Business Review (Denning 2004) where a blogger got going, and then started saying things that the management didn't quite appreciate.

What to do? Although only one of four management "experts" interviewed for the article advised explicitly to close down the blog, three others suggested ways of co-opting the blogger into the management agenda.

"Ay, there lies the rub," as Hamlet might say. The free-flowing dynamic of the blog is at odds with the discipline and focus of a large organization. Given the blog's potentially infinite circulation, it is likely to be seen more as a threat than an opportunity by the powers that be, unless it can be "tamed" and "brought under control." At that point, however, it may cease to be of interest to anyone except management itself.

WIKIS

Wiki is a piece of server software that allows users to freely create and edit Web page content using any Web browser.

Wikis seem more likely to be productive than blogs, because a Wiki is a blog built for a community; it's like a community drawer rather than a personal drawer. It has different rules for participation and is no longer just a threaded discussion group. Wikis have the interesting feature that, if a viewer doesn't think something is said right, it's the viewer's job to re-say it correctly - the viewer can't just comment or criticize it. The attempt to build a gigantic encyclopedia with Wikis on the web is promising at http://en.wikipedia.org/wiki/Main_Page. In principle, it should be possible to use this technology in a organizational context, as a way to build a knowledge base, though I personally haven't seen any examples to date.

INSTANT MESSAGING:

Instant Messaging (IM) is a type of Internet communications service that enables you communicate in real time with another individual. Whereas email could be considered analogous to sending a letter, IM could be considered analogous to a telephone conversation but using text instead of voice.

The potential of instant messaging to keep members of a community in constant touch with each other tends to be underestimated by older people. If you tell a teenager today that you're only using email, she'll think you're a dinosaur. Email doesn't really support the sense of extended presence the way IM does.

RSS FEEDS

RSS is a family of formats used for Web syndication. RSS delivers its information as a file called an "RSS feed," "webfeed," "RSS stream," or "RSS channel." These RSS feeds provide a way for users to passively receive newly released content (such as text, web pages, sound files, or other media).

RSS feeds should in principle be useful as a way to have content streamed automatically to individuals for a particular purpose. The actual examples that I've seen, however, are less helpful than I would have expected; the coverage is not as systematic as I had hoped and the format not always congenial. But the potential is there, at least for information. I'm doubtful how much knowledge will be streamed.

DIGITAL STORYTELLING

So where does that leave us for digital storytelling? If you're interested in transmitting information, then digital methods can be very effective; the web is a very efficient transmitter of vast amounts of information. I differentiate between information and knowledge, however, and much of my work is about storytelling. It involves oral storytelling in a face-to-face mode to communicate complex ideas and spark action.

Quite often people ask me, "Is there a way of accomplishing this task virtually?" In general, my answer is no; when you're trying to pick up a big change-resistant organization by the scruff of the neck and hurl it into the future, merely sending a memo or an email or having a video conference won't get the job done. It's face-to-face, eyeball-to-eyeball communication with a great deal of feeling, interaction, and presence that's needed.

One reason face-to-face presentation is important is because much of the communication is being carried, not by the content of the story, but by the tone of voice, the look in the eye, the gestures and body language. The proportions of "mode of performance" to "content of the story" may be around 9 to 1.

Most of the work of communication is done, not by the content of the story itself, but in the physical interaction between storyteller and audience – it's almost like a dance. In an email or on the web, there simply isn't enough bandwidth to enable this interaction - this dance - to take place.

Afterwards, once people have bought into the change and are on the same wavelength and have a minimal level of understanding and trust, then a great deal of communication that shares information and knowledge through both abstractions and narratives can take place in writing and by virtual means. But getting people on the same wavelength in the first place is a bigger challenge and for that, you have to actually "be there" with your entire heart and soul.

References

Denning, Stephen. 2004. "Telling Tales." *Harvard Business Review*, (May 2004).

*Steve Denning, organizational storyteller extraordinaire, is the author of the acclaimed book, T*he Springboard: How Storytelling Ignites Action in Knowledge-Era Organizations*. The book describes how storytelling can serve as a powerful tool for organizational change and knowledge management.*

From 1996 to 2000, Steve was the Program Director of Knowledge Management at the World Bank where he spearheaded the organizational knowledge sharing program. It was during this period that Steve first discovered the power of business narrative and the use of organizational storytelling to convey complex ideas and spark action.

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The Corporate Podcast Push

by Tim Keelan

What do Duke University, IBM, Capital One, Newsweek, and Barenaked Ladies all have in common? Answer: they are all reaching out to staff, students, and customers with a new and powerful tool – podcasting. You may have heard about podcasting from your kids or the news, but podcasting is much more than some phenomenon started by the rock and roll or techy crowd. Podcasting is a powerful communication tool being used to reach global and mobile audiences, save people time, and most importantly, really connect with audiences in new ways – in today's communication/message glut. But, let's take a look at what podcasting is, who is using it, and why it is so effective for both business and individuals.

First, let's look at the size and scale of the podcasting phenomenon.

- A recent study by the Pew Internet and American Life Project (pewinternet.org) found that more than 22 million American adults own Ipods or an MP3 player and 29% of them have downloaded podcasts or listened to a podcast that was "pushed" to them. That equates to 6 million people listening to podcasts. Market researchers and analysts continue to buoy up podcasting's future with latest figures suggesting a US audience alone of 56 million by 2010.
- In July of 2005, the BBC reported that Jupiter Research predicted that US digital music player sales would grow to 56 million by 2010, up from 16.2 million in 2004 and by 2010, three- quarters of all people who own portable digital music players will listen to podcasts, a growth from less than 15% last year (news.bbc.co.uk).

What is podcasting?

Whether you describe it as the greatest communication tool since email, or as an RSS feed for audio, podcasting is a way to "push" audio content to subscribers for nearly zero cost. Podcasting allows anyone (me, you, IBM, or NBC) to post audio content that gets pushed to any subscriber's desktop and then directly to an iPod or MP3 player.

The term "Podcasting" is derived from the iPod (Apple Computer's popular device for playing compressed audio files) and "broadcasting." Podcasting allows for audio files that would have been previously downloaded and played on a personal computer to be automatically downloaded and heard on portable music playing devices (such as the iPod and other MP3 players).

Having originated in the world of blogging, some have even referred to podcasting as "audio blogging." For many, podcasting is a logical next step from blogging. As Business Week Senior Writer Stephen Baker, "The heart of the podcasting movement is in the world of blogs, those millions of personal Web pages that have become a global sensation. In a blogosphere that has grown largely on the written word, podcasts add a soundtrack." (businessweek.com)

This is global. Anyone, anywhere can "tune in" to your podcast and learn what you have to offer or say. You don't need to be NBC with a global distribution infrastructure. Now people can "subscribe" to a podcast and have new content "pushed" out to them without having to surf the web, download MP3s or burn CDs.

All the arrows go in one direction. Once someone subscribes to your podcast, your content gets "pushed" out to them. There is no turning in to stations with podcasting. You don't have to visit a website to find streaming podcasting. Podcasts simply show up when new content is produced. If you are a subscriber, you get the podcast right then.

Now that you know what a podcast is, let's look at where they come from; who is producing the "pushed audio content."

Who is producing podcasts?

The answer is wide ranging. Teenagers, techies and rock musicians were early adopters. Today you see the likes of Rush Limbaugh, Business Week, ESPN and news programs of all types producing, distributing, and marketing podcasts. The number of podcasts available is growing at a very rapid pace. In late 2004, there were close to 500 podcasts available. Today there are over 10,000 different podcasts to choose from.

Now that podcasting has becoming more mainstream, corporate and non-corporate organizations are getting into the act, using podcasting to connect with customers, students, staff and partners. Here are some examples:

-- Duke University handed out iPods to their entire 2005 freshman class so they could receive podcasts that include university news, class work and social content.

-- Capital One University has handed out over 3000 iPods to support corporate training and communications. This includes, leadership training, sales, customer service and other topics.

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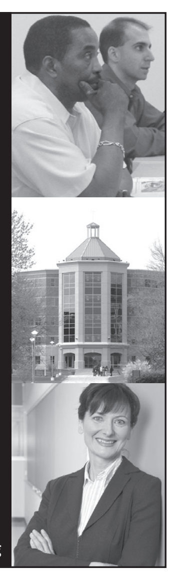

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-- IBM has created podcasts to show their thought leadership to customers investors and prospects.

-- Keane Inc. has handed out over 100 iPods to their global sales force to share training, customers' stories, and organizational content.

Why have these and other organizations gotten into podcasting? Because they know their audience (internal or external) is inundated with text-based content: emails, articles, the web portals, and marketing messages. Podcasting allows them to use a unique medium to reach and connect with their audience.

iPods will be part of Duke University's new Duke Digital Initiative (DDI). "We've been focusing on iPods and other mobile computing, but our wider goal is to integrate technology broadly into the teaching and learning process," said Peter Lange, Peter Lange, the university's provost and senior academic officer. "The iPods have helped jump-start this process, and we plan to keep pushing ahead." (duke.edu)

Listeners love podcasting because it delivers rich content directly to them, in a form that allows them to save time, and control what they hear and when they hear it. No longer is learning tied to a book, PC screen, or web portal.

Content is king in any communication, and even more so with podcasts. Podcasting is the delivery tool. Compelling content ensures continuous listening and not a flip of the power switch or turn of the dial.

Should you podcast?

Podcasting is not the answer to all your learning and communication problems. As great as audio is, like any medium, it has its limits. While audio allows users to multi task, it is not easily scanned – which means you must consider the listener's needs very carefully. You must provide value.

Corporate podcasting is different from individual or media podcasting. The standard for a corporate podcast is much higher than for individual or media. Your staff and customers expect certain things from your communication with them. You can't just offer long-winded rants, self serving commercials, or cute content. It is all about value. When producing that value, ask yourself, Who and how will you produce your podcast? Who will review it and how? Will you get it transcribed? You will need to consider legal issues as well.

Despite these issues, podcasting can be simple. Once you have determined your format and established a process, it gets much easier. Still, podcasting takes a proactive effort, a planned approach, creative development, and the courage to try new things. But, if you have the courage, and are willing to put the front-end work into it, podcasting and mobile audio can provide huge benefits.
If you would like to:

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-- Save your audience time
-- Share the passion, experience and stories of your business

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Tim Keelan is the founder of StoryQuest, Inc. a Chicago-based firm that produces peer-based mobile audio learning and communication tools. You can reach Tim at tkeelan@storyquest.us or by calling StoryQuest at 312-258-0111.

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Distance Mentoring: Exploring Mentoring Without Boundaries

This article was adapted from a Triple Creek Associates newsletter from October 2002: "Distance Mentoring: Exploring the boundaryless power of mentoring." Online posting. Masterful Mentoring.

As the Internet, e-mail, and even the telephone pervade people's lives, most find themselves comfortable working and communicating at a distance. Numerous people work as telecommuters, many can access their banking information online, and the majority of people can pay their bills over the phone. All of these possibilities came about because of technology.

Many intrepid individuals are using these technological advances in mentoring practices by engaging in "distance mentoring." Distance mentoring typically occurs when mentoring partners are in locations far enough apart that face-to-face mentoring is difficult. Yet, people can engage in distance mentoring even when they are in the same city. These relationships take place just as other mentoring relationships do, except that most communication is conducted using some type of technology, rather than in face-to-face meetings.

Why consider distance mentoring?

- To pair with that perfect partner.
- To cross organizational silos.
- To broaden your global perspective.

How can you go about starting a distance mentoring relationship? Try these steps.

1. **Determine what communication technology you have.**
   You might use e-mail, instant messaging, the telephone, video conferencing, or web conferencing technology.
2. **Find a willing distance mentoring partner.**
   Search for someone who understands and appreciates what you are trying to accomplish through distance mentoring.
3. **Set up a schedule of when and how you will communicate.**
   This will help ease you and your partner into the idea of communicating at a distance, and will take into account both of your communication preferences.
4. **Show consideration and understanding.**
   Be a considerate and understanding partner by keeping in mind time zone differences, preferred communication times, preferred communications methods, and fluctuations in schedules and workloads.
5. **Consider sharing a picture of yourself.**
   Most people are curious about what the person on the other end of the phone or computer looks like, and sharing a picture of yourself can help assuage this curiosity.

Keep in mind that distance communication may take more effort and time in the beginning. This is mainly due to the fact that you will have to overtly express your emotions and situation so that there are no misunderstandings. Remember that the written word lacks body language and vocal inflection. Be certain to take your time and fully explain what you mean. This will help create a partnership in which both parties' feelings and responses are valued.

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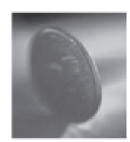

Goal: Learn Basics of Finance, Accounting and Business Decision making in 1-2 days. Understand it, retain it, and apply it

The usual way: Dry lectures, long cases, tear apart financial reports, guessing where each number comes from. In 30 minutes, non-finance people's eyes glaze over, they are lost. Little or no learning takes place.

The better way: 'Bottom Line Finance' from PCI Global Inc.

Participants learn 3 key financial reports and ratios with your firm's financials as examples.. In teams they start up a simulated business with blank financial reports They raise capital, borrow funds, set prices, order equipment, materials and hire staff.

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Capturing Learning Opportunities

This article originally appeared in Chief Learning Officer magazine, www.clomedia.com

by Ajay Pangarkar and Teresa Kirkwood

Editor's note: This article was originally published by CLO Media in June 2004. It has been adapted from the original publication in order to meet the size constraints of this issue. The full text can be found on the CLO Media web site at:
http://www.clomedia.com/content/templates/clo_webonly.asp?articleid=537&zoneid=78

Growing organizations today face many challenges. Globalization, deregulation, and technology create challenges as well as opportunities. Businesspeople often ask us what it takes to survive and profit in these competitive and volatile market conditions. The common answer is to provide improved products and services. We believe that's partially true; but it's not enough. Improved products are expected; in order to compete today, a business must also innovate. Innovation comes from the knowledge and experiences of a business's employees, customers, and suppliers.

Leading organizations understand the importance of developing and managing employee knowledge. Learning becomes everyone's responsibility in these businesses, not just that of the human resource manager or training director. Developing people results in:

- Quicker information and knowledge transfer through the value chain
- Alignment of employee objectives and supplier needs
- Reduction in downtime and wasted efforts
- Increased customer satisfaction
- Increased retention and motivation for the right people in the organization
- Matched competencies and performance objectives

Customer insights and knowledge are also important in order to capitalize on market opportunities and develop innovative solutions. Considering customers fosters beneficial and profitable relationships while reducing the effect of competitive forces on a business.

In addition to employees and customers, suppliers are a vital part of leading organizations strategies as they focus their knowledge initiatives on their core businesses. By delegating (outsourcing) non-core aspects of the value chain to suppliers, they become more flexible and can respond to changing business conditions. They have access to the most current knowledge through their suppliers. This is known as "patching" or "clustering." At the core of these extended enterprises are still the people who create its primary value.

We believe so strongly in the importance of learning for a business's survival, that we recommend that businesses shift from a product or service orientation to a learning environment. Management can begin this transition by focusing on:

- **Employee empowerment:** Empowerment gives employees more autonomy and power over the decision-making process within their work environment. It also allows them to understand how they contribute and fit into the organization's "Big Picture."
- **Technology management:** Knowledge-economy businesses use technology as a tool to create efficiencies and build relationships. Most importantly, they allow their people to communicate and have access to information, which helps them make smarter and faster decisions.
- **Management leadership:** Top management needs to lead by example. In leading organizations, they are the first to show their commitment and enthusiasm for new ideas and processes. They need to become directly involved, and be the first to initiate and integrate the new values within their business environment.

Becoming a knowledge-economy business requires a shift in thinking. Business models that once worked have difficulty keeping up with the current volatile environment. Businesses need to manage learning and performance as well as the content presented at learning events. Most importantly, they need to harness the knowledge inherent in their employees, customers, and suppliers.

Ajay M. Pangarkar and Teresa Kirkwood (info@centralknowledge.com) are partners and learning strategists at CentralKnowledge.com, a strategic learning provider that specializes in helping companies effectively manage their core learning services and develop the skills of their training teams. Visit CentralKnowledge at www.centralknowledge.com to obtain a complimentary learning management diagnostic to determine if your organization has the elements to become knowledge-enabled.

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Project Management for Trainers

By Lou Russell

This article is an excerpt from Project Management for Trainers, *by Lou Russell, ASTD Press, 2000.*

Whether it is developing a new course, adapting an existing course, finding the right self-paced solution, rolling out the right training administration program, or hiring the right external vendor, you are constantly working on projects. It would be important to know project management if you were working on one project full time. It is critical to know project management when you are working on multiple, complex projects, as today's workload demands.

A business problem in your organization will generally drive your project work. This business problem will be caused by either a missing skill (something people can't do), a missing piece of knowledge (something people don't know), or an inappropriate attitude (something people believe) that is hurting performance. The solution to this business problem may take many forms at implementation. Some type of training intervention may be part of the solution, but is rarely the only piece needed. The training piece may take the form of instructor led, computer based, video based, web based, teleconferenced, or even paper tutorial. In this book, I will refer to this type of intervention as a learning event. Other solution components may take the form of a formalized mentoring procedure, a facilitated problem solving session, or study group. These interventions have recently been lumped under the category Performance Consulting. In all these cases, project management will be required to define, plan, manage, and review the solution to ensure the right business results.

What is a Project?
The best place to start is to clearly define what you mean by the term "project." It may seem obvious, but it often isn't. A project has a distinct beginning and end. For example, developing a new course is a project. There is a day you start it, and there is a day that the course is implemented and someone learns from it (hopefully). That's not to say that there won't be an ongoing set of activities to maintain and enhance this course as it lives its useful life. That is not a project, but a maintenance process. Ongoing activities without a specific end-point are called processes.

Simply put, project management is Planning, Organizing, and Controlling work. The person responsible for project management plans for the needs of a project then organizes and controls project resources as the project progresses. This individual has one foot in the future (creating a plan), one foot in the past (learning from mistakes), and the rest of him is in the present (reacting to surprises). This role is called the project manager.

The project manager has the "Big Picture View." They are watching the entire forest, not a specific tree. That is why it is so difficult to be the project manager and, at the same time, the course developer. The project manager is keeping track of the gap between planned and actual time, cost, scope, and quality. The course developer is building and focusing on getting that "thing" built. Each role has a very specific focus that importantly, is not the same. Put in learning organization lingo, the project manager and the course developer do not have a shared vision of priorities.

With today's workload, it is not uncommon for people to have to play many roles, and play them in half the time that's really needed. This makes the control responsibility of project management all the more critical. Someone has to see the glitches coming and react before the project is torpedoed. As projects are getting more complex and risky, project management is the only way to hedge your bets toward success.

"The will to win is not nearly as important as the will to prepare to win." This quote from basketball coach Bobby Knight reflects my belief that effective project management is a combination of a flexible, but repeatable process, and a growing, intelligent mind.

Lou Russell is president and CEO of Russell Martin & Associates (www.russellmartin.com), a consulting and training company focused on improving business results. Lou and her staff deliver learning experiences that are fun, flexible, fast and measurable. She focuses on project management, leadership and organizational learning problems.

Lou is the author of The Accelerated Learning Fieldbook and Project Management for Trainers, IT Leadership Alchemy, Leadership Training, and Training Triage. She is a frequent contributor to Computer World, Cutter Executive Reports, and Inside Indiana Business, among others, and publishes the monthly Learning Flash electronic newsletter.

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Performance Centered Learning™: Seven Tips for Making Training Better

by Marty Rosenheck, Ph.D., CPT

Faster! Cheaper! Better!
We all know that our goal for training is to improve performance on the job. We also know that we have tight training budgets and shortening turnaround times. Our customers want it faster, cheaper, better. Our challenge as learning professionals is to deliver "faster" and "cheaper" – without sacrificing "better."

Clients may assume that the cost of training is the cost of implementing the training program. However, the real cost, at an organizational level, is related to how quickly learners develop proficient job performance after training. That is, how fast they come up to speed in complex jobs. These costs are substantial, but rarely measured. We all know they exist – and they can be huge.

These costs show up as:

- Sub-par productivity
- Mistakes
- Dissatisfied customers
- Time spent getting help from others
- Manager's time reviewing and correcting work
- Attrition of people who feel overwhelmed by their jobs

Many organizations invest substantial resources in training, yet trainees may find that after training, they still can't perform without substantial help and support. It can take months, or even years, before they become proficient, because *expertise develops through experience*. This takes time that most of us do not have.

If we can reduce the time it takes to create experts (or at least proficient performers), we can save our organizations a lot of money, increase retention rates, reduce errors, and improve customer satisfaction.

Research in cognitive science can help us design training that is better; training that leads to faster proficiency, especially for people with complex jobs like sales, customer service, computer systems, leadership, and management. Over the years, we have developed a methodology for effective learning that we call "Performance Centered Learning" based on this cognitive research on how people develop expertise.
Here are seven tips for making training better. They have been developed from our experience applying Performance Centered Learning principles in many organizations.

1. Put situations and experiences front and center
The central element of Performance Centered Learning is learning by doing. This is not a new idea. Thousands of years ago, Confucius said, "I hear and I forget. I see and I remember. I do and I understand."

The usual approach to training has been to provide all the background knowledge and Skills first – and then have the trainees practice. The Performance Centered Learning approach turns that sequence around by putting situations and cases front and center.

2. Use real-life situations and cases
Have trainees work through a set of cases that comprise the situations they will encounter on the job. Trainees thereby construct a mental "library" of cases that can be referenced on the job; this gives them skills that can be readily transferred. The cases can take many forms: online simulations, paper-based formats, classroom simulations, role play, or structured on-the-job experiences.

3. Use top performers as the target for organization of knowledge
Use master practitioners, people with expertise in actually doing the job, as the standard to target for organizing your training. The goal is to help learners organize their knowledge the way that top performers do, not the way a PowerPoint presentation does. Use knowledge engineering techniques to uncover how experts organize their knowledge.

Researchers have found that the major difference between novices and experts is not only the *amount* of knowledge they have, but how that knowledge is *organized* in their minds. Novices organize their knowledge to match the neat outlines of training modules. Experts take years of experience and reflection to reorganize their knowledge according to how it is used to solve real problems (Ericsson 2006). Unfortunately, in today's organizations, we don't have years to wait.

4. Create a systematic set of experiences
How can we shorten the path to expertise? By exposing learners to a systematically organized set of situations in a compressed timeframe.

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THERE'S VIRTUE IN HARD WORK.

In a relatively short amount of time, learners have experiences that it would otherwise take years to accumulate and begin to organize their knowledge the way experts do. They can see how each new case is similar to, and different from, those they've experienced in the past and they can adjust accordingly.

The situations chosen for the training program should be organized to enable learners to:

- Encounter a wide variety of cases
- Reflect on their experiences within a community of learners
- Progress from simpler to more challenging cases
- Begin with substantial training support and guidance, and gradually reduce the degree of guidance

5. Capitalize on the *teachable moment*
As trainees work through cases, they are faced with decision points, moments where the learner thinks "Hmm, what should I do?" At that point, the "teachable moment," trainees are motivated to learn, because they need information to complete the task at hand. They are also likely to remember that information later, on the job, because by getting information at the teachable moment, trainees create a mental link between the information and how it is used on the job. This means the information will be "indexed" in trainees' minds, and so it is easier to retrieve when needed in real life. The teachable moment is a key feature of Performance Centered Learning. Construct cases so that they present a series of teachable moments that set up opportunities to learn key content.

6. Provide a knowledge base that can be used on the job
Make sure that the content information is easily available to the student when it is needed at the teachable moment. Use multiple types of information sources to accommodate people with different learning styles:

- On-line reference
- Mini-tutorials
- Expert stories
- Video or audio clips
- A mentor or expert available in person or virtually

The same knowledge base that is used during training can also be used on the job for performance support.

7. Integrate skills and knowledge
In many traditional training programs, content knowledge, computer systems, and interpersonal skills are taught separately. However, when trainees learn these separately, they are unprepared to put them together on the job, as is done seamlessly by a proficient performer. For example, a call center rep uses software, procedures, and interpersonal skills at the same time to solve customer problems. This is the real training challenge – to teach trainees to coordinate skills and knowledge the way that an expert does.

Create simulations and experiences in the training program that integrate those skills from the beginning (start simply and gradually build complexity).

Better is Faster and Cheaper!
These tips from cognitive science research can help us close the gap between training and performance thereby accelerating the development of proficiency. When you look at the big picture of time to proficiency *after* training (not just the training event itself) – you see that "better" can actually lead to "faster" and "cheaper."

Biography
Marty Rosenheck, Ph.D., CPT, is vice president of design and development at Cedar Interactive, a custom training, e-learning and performance solutions company. He has been helping people and organizations develop expert performance for over 20 years. Marty has designed award-winning learning systems, conducted needs assessments, developed curricula, and created blended learning strategies for numerous non-profit and for-profit organizations. Based on his doctoral work in Cognitive Science, Marty developed a learning approach called Performance Centered Learning that helps people build expertise through guided simulations. He can be reached at mrosenheck@cedarinteractive.com.

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Change Management: An Interview with Dick and Emily Axelrod

Training Today: Your philosophy of change management includes eight principles. How do they affect the way you do your work?

Dick and Emily: We do not use a formulaic approach to change management. Rather, we build on our principles. When we have a new project, we go into the organization and see how the principles apply to that particular situation. We never do the same thing twice. There are similarities, of course, and we build on our experience to get started.

Training Today: How do you demonstrate and communicate the value of your programs?

Dick and Emily: We are lucky enough to have been around a while and we have a proven track record. We can point to metrics such as an 18% increase in productivity, a 35% improvement in employee satisfaction ratings, and dollars saved after we implement change. But, the numbers don't convince leaders to bring us in. They can always question the numbers and claim that their organization is unique; and they would be right to do so! Instead of citing metrics, we identify the critical needs and business issues of our clients. We explain to them how we will help them address these issues. The leaders aren't interested in our methodology; they want results!

Training Today: What is your relationship with the CEO and executive team in the companies you serve?

Dick and Emily: We get buy-in on what we're doing instead of selling a program. We educate the executives on the possible outcomes of working with us. We help develop a list of options and identify the ups and downs of each. That allows them to choose a direction and commit to it.

Training Today: Are there unique features of change management training compared to, say, training on the use of a software tool?

Dick and Emily: Tools training is important and needs to be done. Even in these cases, though, we advocate getting people involved early in the introduction of a new tool.

For example, we worked with a union organization during the implementation of a supply chain system. By the end of our sessions with them, they were asking for training for their people instead of resisting it. This happened because they understood the vision and reason for the change and how they could contribute. In our approach, the introduction of a new tool is change and should get the same attention as other change initiatives.

Training Today: What are your thoughts on CPLP certification?

Dick and Emily: I think it is a good idea but there are a few things to watch out for. If, for example, the licensing becomes arbitrary or seeks to exclude people from the field, that could be a problem. Also, it is important to set realistic expectations; it is important that people understand that merely having the certification will not get you the job. Your competence will be what matters.

1. A compelling purpose creates interest.
2. Public information and decision making create trust.
3. Involve the whole system to understand the whole system.
4. Create a safe enough environment.
5. Involve the whole person.
6. Have a future orientation.
7. Egalitarian spirit builds trust and community.
8. Co-creation builds ownership and commitment.

TRAINING TODAY OR ??? TODAY

Attention readers of the TT Quarterly Magazine: We have a challenge for you!

Training Today has been a mainstay in our Chicagoland Learning and Performance community for many years. The CCASTD board extends a huge "thank you" to everyone that has helped make it happen. Special thanks for the meticulous direction of great editors and staff and most recently, Karen Bolek. Thanks also to the many published authors for their contributions and to our sponsors for their support. We are proud to say we have won many awards and have provided a great resource for Workplace Learning and Performance Professionals.

2006 is about change and, as a part of this new beginning, we are considering changing the name of our Training Today magazine. Yes, Training Today is a brand name–do we keep this title to maintain continuity or rename the magazine to reflect the new certification process and our roles as Workplace Learning and Performance Professionals?

If we look at National ASTD and their "State of the Industry" Report, we find only a handful of organizations that still use the word "training." We could follow ASTD National's lead and replace the word Training in Training Today with "Workplace Learning and Performance." The result would be: Workplace Learning and Development Today.

We'd like to hear from you. Do you want to keep the name Training Today? Do you like Workplace Learning and Performance Today? Or, do you have a creative idea for a new name? Please let us know!

Send your name suggestion to cathryngoodman@yahoo.com and we will report the nominations in the Spring Quarterly Magazine. Thanks for your help!

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