Creating
AMAZING

Technical Learning

Dick Carlson

How to terrorize management, corral SMEs, calm project managers, negotiate with budget managers, pacify editors, befuddle critics and create world-class learning without going nuts in the process.

CREATING AMAZING TECHNICAL LEARNING

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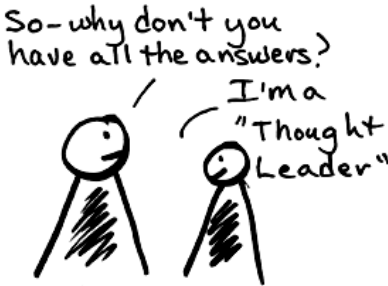
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INTRODUCTION

I FEEL OBLIGATED to warn you that by reading this book you're likely to put your job in peril. For years I've managed to piss people off, lose contracts and generally get in trouble because I keep asking "why" and carving big juicy roasts out of sacred learning cows. So it might be best to take advantage of the 100% money-back guarantee and order one of those books that give you a time-tested template for creating tidy little templates of training.

Do I have all the answers? Hell no! I just tend to accumulate more and more questions, the longer I do this work. I've found that the introduction of humans into any neat and tidy system tends to screw things up completely, and so it's really hard to predict what's going to happen to

your favorite learning theory. I spent thousands of hours (not to mention thousands of dollars) learning all that stuff, got to put "M.Ed." after my name, and ultimately have come to the conclusion that it really doesn't mean much.

YOU'VE SKIPPED TO HERE, ANYWAY

NOBODY READS the text anyway, anymore, so I'll just give you some bullets to look at:

- The content of this little book are posts from my blog, TechHerding.com – revised a bit for the book, but not much – I try to do as little as I can to get by.
- I'm assuming that you work in the training field – if you're a newbie or some kind of middle manager, ask for the refund.
- Please disagree, argue, or get red in the face – I often tend to go a bit outside the envelope to make a point or get your attention.

HAVE YOU READ ANY OF THE TEXT, AT ALL?

THERE REALLY is no flow here – you old-timers are going to be horrified – because in our learning world of today there isn't really much flow anymore, anyway. We click and search our way to comprehension (well, what we do comprehend) and I'm fine with that. Look at the table of content, flip pages, or scroll through the electronic version. Or be really contrary and start at the first page and go through to the end.

Since I just pretty much cut and pasted content from the blog, and there's no flow there, it seemed silly to try to make something up here.

AT LEAST YOU READ THE HEADINGS, I GUESS

IF YOU'D LIKE to see more of this stuff, or something more recent, head off to the blog. If you think I'm a total idiot (there's probably a Yahoo group forming as I write this) feel free to comment on a specifically lame post, or show up when I speak and take me to task.

Or you could just get your own damn blog!

WHY WEBCASTS DON'T WORK—AND HOW TO FIX THEM

I DON'T KNOW ABOUT YOU, but my mailbox is flooded with invitations to join what are commonly called "webcasts." Presented with tools like Webex, Elluminate and MS Live Meeting (commonly referred to as "synchronous" presentations) they are usually pretty boring.

There's a PowerPoint slide on the screen, and a droning voice in the background. Often the person is haltingly reading a script, and sometimes they show a demo of a very tiny fuzzy computer screen.

I don't know about you, but within the first five minutes I'm off reading mail, eating lunch, or browsing the net. This is an example of 1960's education that really needs to be retired. There's a great book called Telling Ain't Training that goes on in great detail about why this doesn't work.

So does that mean all synchronous training is doomed to fail? NOT! You just need to apply some basic educational principles and do a little homework.

HAVE MEASURABLE GOALS

BEFORE YOU EVER START thinking about what to say, develop 2-3 measurable goals that describe the benefit/learning that a participant will receive from your webcast. "Student will be able to install Product X", or "Student will understand the benefits of using Product Y", or "Student will learn three configuration models of Product Z."

BAD EXAMPLES:

> "A lap around "
> "Bob Smith teaches you about"
> "Increasing security in"

THE FIRST FIVE MINUTES ARE CRITICAL

MOST WEBCASTERS spend the first five (or ten, or fifteen) wandering vaguely in the darkness. They try to get their mike working, answer chat questions, give their entire professional biography or even ask the moderator how the software works. Start out with some key information that is of benefit to the attendees — solve a problem, ease their pain, or entertain. Log on early enough that nobody ever hears that you don't know how this stuff works, or that you can't find your slide deck.

USE POLLS TO MEASURE ENGAGEMENT

MOST TRAINERS I know rank this model of presenting as by far the most difficult to do successfully. You can get a better pulse of your audience (critical in any kind of teaching) by using the "poll" function often. I actually script a simple poll every five minutes in my presentation. It gives me feedback on what people are thinking, but (and more importantly) it shows me how many of the 100 people signed on are still listening at all. This is often a humbling experience.

CHAT IS YOUR FRIEND! DO NOT FEAR CHAT!

MANY PRESENTERS are quick to "lock" the chat function. (You remember Mrs. Strand in the Second grade, right? If you passed a message you got a time out.) Don't give in to this kind of thinking! Encourage people to chat — ask them to answer your questions in chat, send questions for you, give examples of how they've solved a problem. If you're a newbie presenter, make sure you have a couple of friends who can monitor/respond to all

this. But you'll find the level of engagement (and learning) rockets up if you prime the chat pump.

PREPARE, PREPARE, PREPARE

I'M AN EXPERIENCED PRESENTER, curriculum designer and technical trainer. To present a one-hour synchronous session requires about 20-30 hours of preparation. I'll have about 10 polls, about 60-80 slides, and 1-2 helpers to manage the details. I'd no more try to "wing it" in this venue than I would in a sit-down class session. And you shouldn't, either.

MEASURE, MEASURE, MEASURE

MANY OF YOUR QUESTIONS should be directly related to your learning goals. It's the only way you can really determine if you're teaching anything to anyone. Offer a t-shirt, a poster, or a lock of your hair if you must — but find out if what you are doing is working. Once again, this will be humbling.

HAVE FUN!

THE MOST BORING SESSIONS I attend are where a droning voice reads the "corporate approved script" and never deviates. Be a person. Talk about how you screwed this up the first time, how you have trouble remembering the sequence, or how you explain the concept to your mom. Don't crack jokes unless you're a professional comedian — that is dangerous territory, young Jedi.

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Ok — that's what I know. Now get out there and get rid of all those boring webcasts!

THE SMARTEST GUY IN THE ROOM

WARNING: Contains Educational Theory Content. This could cause nausea, drowsiness, snoring, or extreme boredom.

I've done some kind of technical teaching or training for all of my adult life. Like most trainers, when I first started, my goal was to get an evaluation from the students that I "knew everything and could answer every question." (This required, of course, hours and hours of study so that I could answer every question. I call this model of teaching "The Shell Answer Man.") It really meant that I'd done a good job if I knew what every

button, dropdown menu, shiny lever and hidden easter egg was for.

NAPPY TIME

ONE DAY, I realized that I was bored to be answering the same ten questions over and over. I began to think about whether the people in my classes actually learned anything. (I hadn't had any education about education — I was a talented amateur doing things to see if they worked.) So I started giving a little quiz now and then, doing a review at the end of the session, and other types of very basic assessment. The results were frightening.

Most of the information that I thought I was giving these people by speaking in a clear, loud voice wasn't filtering in to their skulls. I tried harder — speaking slowly, enunciating clearly, repeating things several times. No real difference. (I considered just giving up on the "assessment" thing, as all it did was make me feel ineffective.)

Turns out that those "educational theory" guys knew this already — and had for years and years.

(These are the same folks, of course, who lecture for a full hour in their college courses — and are highly paid and respected.)

I did hear that some things would increase the retention of information — having the student repeat the concepts out loud, draw pictures of them, teach them to a partner, use flash cards, chisel them in stone, build replicas out of mashed potatoes…

But I found that what I used to be able to "teach" in an hour now took all day. Before, I could just shout out the facts and move on. Now my boss was really pissed at me. All the other trainers could finish that five day course in five days. Oh oh.

My students were ecstatic. They actually took real skills away, that they could use on their jobs. Instead of boring lectures, they got to build and do and draw and talk — much more fun than listening to me drone on and on. I taught Word by having them write and format letters of resignation to their boss. I taught Excel by having them create the books for a Mafia hit man. ("Bullets, May. $5″)

Yes, I know this is a cartridge and not a bullet. Sue me. But I still had a problem. Some of the students could complete the tasks quickly, some not so quickly, and some would never be able to do it. I tried teaching at all three levels, having the quick ones work with the slower ones, and other desperate measures.

I finally realized (well, during the process of finishing a Master's Degree in Education) that not all students are headed for mastery. Indeed, probably well under half of my students had a goal of learning how every single button worked. I'd managed to confuse MY goals with their goals. In my addled little type-A brain, it was a failure if they couldn't do a complicated merge-purge without ever referring to a help screen.

At lunch today, I was talking to a friend about my experiences a few years ago as I began the process of getting a private pilot's license. My instructor, an earnest young man with 1000+ hours of flying in his logbook, defined success as doing everything 100% right. Mine was doing enough

things right that I didn't die, break the airplane, or cause too much grief to other people in the sky.

So even when I managed to plant the damn Cessna down on the end of the runway with three bounces, we mostly focused on what I'd done wrong. And then had me do it again — and focus on the stuff I'd done wrong. I stopped taking lessons — ostensibly because of financial issues — but also because it just isn't much fun to pay $150/hr to be told you're dumb.

Back to education — the lesson here, if there is one, is that we all start our learning in a different place. We all are headed to a different definition of "completion". And each and every one of those is valid. When I listen to a podcast while I'm reading mail, I probably only hear 25% of it. But that's ok

— it's more than I'd get otherwise, because I don't have a spare hour.

When I buy a Big Thick Book about a new software product, sometimes I only use it twice — looking in the index to answer a specific question. That's ok, too.

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I'm still working on mastery in a few areas — husband, friend, doggie daddy — but in many others it's now ok to only learn what I need right now. It's important to remember that when you think about designing any kind of learning materials.

LECTURES DON'T HAVE TO BE EVIL

I SOMETIMES tend to be a little sarcastic when people refer to lectures (or speeches, or presentations, or breakouts) as learning. At one level, that comes from the fact that mostly all of the education literature shows that talking at people doesn't result in learning.

Did your mom tell you not to touch hot things? To always wear clean underwear? Wait to have sex until after you were married?

Yes, you heard the lecture. No, you didn't really change your behavior. Talking at people

carries about a 10% guarantee of success, depending on how you measure results. I'm not sure if your airline announced they guaranteed a 10% chance of your arriving in Wichita that you'd get on board.
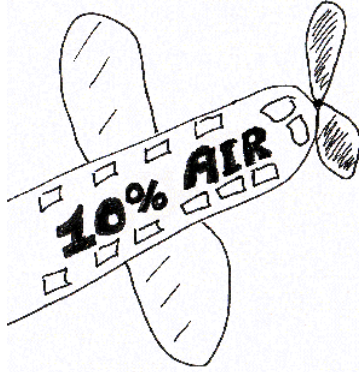
But there are ways of giving a lecture that have a better chance of getting your message into those little ape-brains in front of you, in a way that just might stick. Here are my favorites:

BEFORE YOU WRITE THE FIRST WORD

Or, God forbid, the first PPT slide, write out a one-sentence benefit statement and nail it to the monitor. What's In It For Your Audience? These people don't care what your "message" is, they don't care if you meet your sales goals, they don't care if your widget has lots of blinky lights and

semi-transparent windows. It doesn't take salesmanship to sell water in the desert — people understand clearly that they want it.

TELL A STORY

The oldest form of communication started around the campfire, as we munched dead beast and told the others how we'd caught their dinner. What's your story? There should be a hero, a quest, a challenge, and a resolution. (Google "Joseph Campbell" if you'd like more on this.)

BE CLEAR ABOUT WHAT'S IMPORTANT

Start your talk by listing three (no more) things you're going to cover. Cover number one, then repeat the list. Cover number two, then complete the list. Cover number three, then repeat the list. Don't make me think!

ENGAGE WITH YOUR AUDIENCE

At least 30% of the time they should be talking while you listen — and then restate what you heard to ensure you got it. Questions like "did it work that

way for you?" and "who's had a problem with this?" and "how do you handle that in your shop?" are all great ways to bring out information from the crowd. You'll be surprised that many of them know more than you do.

PROVIDE A TAKEAWAY

In years past, we used to hand out copies of our PowerPoint slides. Ick. Build a simple web link site on your blog that has 5-10 of the main things you mentioned — including any tools, resources, people or other items that would be useful. And if you must, put your PPT deck up there, too.

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You still won't get the level of retention if they can touch, feel and manipulate the widget, but you'll be a top presenter and loved by all. Not bad.

WRITING IS HARD. THAT'S WHY SO FEW PEOPLE DO IT GOODLY.

IF YOU'RE TRYING to communicate with customers, support the users of your products, or just share important knowledge with other humans — you'll probably end up needing some words in a row. But even though you passed penmanship in third grade, you might consider hiring a pro.

FLOWBEE

LIKE FIXING your transmission, neutering your dog, and cutting your hair — some tasks are better left to someone with the appropriate background, tools, and perspective.

"The server framework goes in, the website framework goes out. The effect is similar, the innermost attributes override the outermost, but the difference is subtle, in the website framework the storage location of the content determines its attributes, in the server framework, the path that got you to the object determines the attributes."

That seems simple enough, right? An old rule says that you shouldn't use a word when you're providing a definition of that word. Makes sense.

So what do these "writer" types know that you don't? Most of it's simple to say, but a little harder to actually do.

MR.ROGERS

FIRST ON THE LIST is learning to write in the correct "voice". That means sound like a drill instructor if you're training soldiers, and like Mr. Rogers if you're teaching kindergarten. Don't talk down to your audience. Don't use lots of abbreviations and mystery words.

Second consideration at the Real Good Writers School would be to create a clear outline before you begin. Imagine you're driving from Seattle to New York. To begin, that's all you need to know. Next, what Interstates will you be taking? After that, what local roads will take you to hotels, food, and huge plaster dinosaurs? Remember that we all need clear signs of where we're going, where we are, and where we've been.

Third thing is to edit brutally. Writing is easy, cutting is excruciating. But go back and cut out
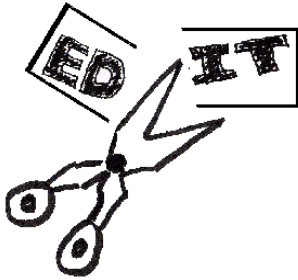
every single word that doesn't add value. Unless you're being paid by the word, less is more. Turn prose into bullets. Add an appendix. Use incomplete sentences. Like these. (Well, unless you're still in the third grade. I don't want a blemish on your permanent record.)

VISTA CAPABLE?

FINALLY — don't try to impress me with your stunning vocabulary. The use of little, short words eliminates a lot of confusion. Say "fired" not "downsized". Say "broken" not "limited functionality". Say "it slipped again" rather than "we're delaying the release because of our commitment to quality."

And use the damn spell checker.

WHAT CAN YOU LEARN ABOUT LEARNING—FROM STARBUCKS?

Would You Like Whipped Content With That?

SOMETIMES, IT'S A LITTLE HARD to get your head around how you could implement new media channels into your existing education efforts. So this is Part I of a 435-part series entitled "What Could You Learn About Learning?" (My apologies to Stephen Colbert.)

I've picked five random things that are trademarks of the folks with the little green

mermaid, and I think each can be used to remember a simple truth about pushing knowledge into little lizard brains. Let me know what you think.

FIRST, DO ONE THING WELL

THE ONLINE WORLD is full of people who do everything — and nothing. It's hard to define what they're offering, hard to remember who they are, and hard to focus. Does your knowledge transfer experience map to that? Do you offer classes, online, offline, synchronous, asynchronous, job aids, reference materials and fireside chats?

Quantity isn't necessarily a good thing. It's devilishly hard to create multiple learning models that actually complement and support each other. Start your move to new media by just producing a podcast. One podcast, about one course. When you've got that down solid, apply what you've learned and do another. Don't rush off to video, or blogging, or thought-transfer pills. If you're in that much of a hurry, hire somebody who's done this a

lot to guide you — and even then, keep an eye on him.

GIVE THEM A CONSISTENT EXPERIENCE

THERE'S A REASON that the "next" button is in the lower right-hand corner on lots of e-learning products. (No, there isn't really any data that suggests that's the "best" place for it.) The reason is that most designers put it there, so we've come to expect it. That's why toast comes out of the top of the toaster, shoes lace up in the front, and cats always have their butt facing you.

60 MINUTES

SO EACH VIDEO you create should have a common intro and outro, a similar introduction, even a similar look and feel surrounding the content. Think "60 Minutes" or "Publisher's Clearinghouse" or "How My Toilet Works." Sometimes knowing exactly what to expect is very comforting. Having to figure out a new system often just breaks your focus and becomes annoying.

Every Starbucks I'm in, there's one stop to order and one stop to pickup. The products have the same names, sizes, and ingredients. And there's always somebody sitting in the comfy chairs.

ALLOW ME TO ADD THE SPICE TO MY EXPERIENCE

WHEN I'M IN STARBUCKS, I know there's no chance that I can add fries. But I do know that I can have extra flavors, less milk, cinnamon, room for cream, or even soy milk. So I can really make "my drink" within the bounds of what's available. Can your learners customize their experience, while still sticking to the "be consistent" rule? Can they add something, remove something, or customize the size?

Adults want to control their learning experience, and push back pretty hard if you present it as one-size-fits-all. That's why the web has had

such an impact on how people take in knowledge. We expect that it's ok to start with Chapter 5. We want to look at the finished bookshelf before we start assembling. Going to a hotel without seeing the room in a preview is no longer ok with me.

LET ME KNOW WHAT'S NEW, WHILE I'M WAITING IN LINE

EVERY STARBUCKS has a little chalkboard sign, where the barristas put up a little note about what's new. It might be a Pumpkin Spice Latte, Christmas Mint Cookies, or Filet of Mermaid. (Ok — I made that one up.)

I don't know about you, but I don't often take them up on it. But I like to know that there are choices available — in some ways, it makes mine feel a little more valid. It lets me know that it really is ok if I want to have the hazelnut syrup today. And I have confidence that each time I visit, there will be freedom to select just what I want.

I DON'T WANT TO FEEL YOUR PAIN

WHETHER I'M IN THE drive-up window or at the counter, I rarely have any idea of what's going on behind the curtain. I'm sure that some days the steam is too hot, the milk is running out, or the microphone for the drive-up is not very easy to hear.

But I don't ever hear that. Everyone I deal with is positive, smiling, polite and focused. Compare that experience to most other food experiences (heck — compare it to quick lube shops and Home Depot) and tell me what you see. When I'm in the middle of learning, I don't want to hear that your server is unavailable. I don't want to create a blog post and lose it in editing. I just don't care that you're upgrading the site and I can't find the podcast anymore.

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*What could you learn from Starbucks? Who else do you learn from?*

IS IT TIME TO DECLARE "LEARNING BANKRUPTCY" FOR YOUR COMPANY?

I WAS FLYING on Delta, headed to Salt Lake City. You may remember that they were pretty much forced to declare bankruptcy — the nature of their market had changed drastically, they were burdened by old models and equipment, and if they'd continued doing business as usual they would have collapsed. So they took advantage of the opportunity to call a temporary halt and change how they operated.

DELTA IN TROUBLE

NO, THIS DIDN'T MEAN that they changed their overall objective. And it has resulted in a successful
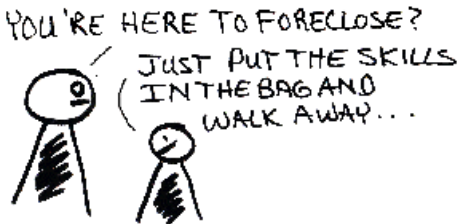
operation that satisfied my needs as a consumer. But there were some groups that had to drastically change what they got from the pie, some that vanished entirely, and a few that are still smarting. What would it mean if you decided to declare "Learning Bankruptcy" for your company, and restructured to match the realities of your current situation?

ADDRESS THE CHANGES IN YOUR SITUATION

STATE UP FRONT what has changed in the situation — lower budgets, more training areas, younger employees who are more tech-savvy — and re-cast expectations from your audience. Maybe it's no longer realistic to expect that your major method of delivery is Instructor-Led Training.

Maybe you can no longer take on every training request, and need to start a system of charge-backs or funding options. Maybe you need to quickly move to new technology and learning models, to match your new learner's expectations.

NEGOTIATE WITH YOUR STAKEHOLDERS

AIRLINES FOUND that some stakeholders (like airline manufacturers) were willing to structure long-term agreements that would lock in purchases, but were more suited to the financial realities of the market. But some stakeholders (like pilot's unions) were unwilling to budge. In some situations you'll need to make a major change that just isn't going to satisfy everyone, in order to put your ship in order. (Yes, I've mixed the metaphor. Get over it.)

COMMUNICATE BROADLY — BOTH BENEFITS AND PAIN

MAKE SURE that you are transparent and open across your org — both in the "bankruptcy filing" and the "restructuring plan" parts of the process. It's important that everyone understand the cause of the

crisis, the possible options, and the process for making decisions. You might be surprised what some stakeholders would be willing to do, short term, to ensure a seat at the table in the future.

BITE THE BULLET, AND MOVE ON

ONCE YOU'VE GOT A PLAN, set a deadline and implement it. Endless discussions and negotiations probably won't make the situation better, and it's usually pretty easy to see where the big problems are. (I doubt that Delta spent a lot of time negotiating with the cocktail napkin providers. Or the pillow manufacturers.)

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So — what would it look like if you filed for protection? Would your executive team support you? Would your stakeholders understand the need and work together? Or has your ship already taken on so much water that you're just waiting for the band to stop?

YOU CAN LEAD A HORSE TO WATER, BUT HE'S GOTTA WANT TO SWIM

THE TITLES are the hardest parts on these little missives, you know. I'm supposed to write something that gets you all excited and uncontrollably interested in clicking and reading more. Today I'm thinking about the process of moving some of the more "traditional" members of the training community into the realm of new media — blogs, wikis, podcasts, Second Life, Facebook, Twitter, Blotto, Snackit, Zeldasize and Morlo.

(You recognized all those, right? You're hip? With it?) Well lately I've been talking to an

audience that thinks every one of those things is made up, scary, and pretty much outside their comfort zone. I started teaching people a lot of years ago, and was really comfortable with it — standing up in front of the room talking, just like my 3rd grade teacher. She was really smart, I remembered — and then one day I saw her "Teacher's Edition" of the textbook, with all the answers at the end of each chapter.

That's when I became one of those difficult students. Talking to others, questioning authorities, coloring outside the lines. If you ask most of the people who know me now, they'll tell you it hasn't changed much. I'm always asking "why?" and trying it a different way, just to see what happens.

SO — BACK TO TRAINING.

I'M WORKING with a local training group to develop an event for them. It's focused on "the future of training" — something I'm very interested in. I've spent lots of other people's money on cutting edge techniques, experimented with

thousands of victims, and had access to some of the sharpest minds on the planet in this discipline. (No, I'm not one of them. Metaphorically, I'm the blunt-nosed scissors of this discipline.)

My personality is very similar to a deaf and blind bulldog. Forging ahead, not listening, just slobbering over everything. And I've found that in my attempts to get this audience on board with some of the "scary" parts of this new world, I'm mostly just annoying them and coming off poorly. I assumed that once I had told them this stuff was neat, my job was finished. Everyone would jump on my band wagon (what is a band wagon, anyway?) and we'd all roll into the future together.

What I'm seeing is that there are very serious concerns that people have about leaving what they used to do, and jumping into something new and risky. What if I

look silly? What if people take advantage of me? What if it doesn't work perfectly the first time?

I'm not sure that I've really got an answer for any of those, to be honest. I've spent my life looking silly, so it's not that big a deal. Lots of stuff I do is a huge disaster the first time. And I get taken advantage of a lot — like agreeing to work for a huge number of unpaid hours on an event that most of the members don't want to attend.

But I am taking something away from this, other than money. I'm realizing that when I work with clients who actually PAY me, I need to remember that it's not enough to be right. It's not enough to push really hard, and to believe in what you're doing.

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I've gotta find a way to make sure they want to get on the wagon.

MANAGE YOUR TRAINING DEPARTMENT—THE EBAY BUSINESS MODEL

OK, I'LL ADMIT IT. I tend to be a little outside the box. I'm not really saying you need to auction off your Instructional Designers, but think it might be time to change how we think about the function of the traditional Training Department.

I'm basing the discussion on the e-Bay Business Model. It's pretty different from any other online business (or brick-and-mortar business) in three important ways:

1. They Don't Buy Stuff
2. They Don't Own Stuff
3. They Don't Sell Stuff

Your Training Department probably "buys" learning content (pays people to build it). You probably "own" learning content (maybe you even bought a shiny new LMS.) And you certainly "sell" learning content — if not for money, you sell the value to your management and your CEO.

What would the world look like if you didn't do any of those? (Don't panic — I don't think you'd be out of a job.) You might have a very different experience.

QUIT BUYING LEARNING CONTENT

MOST OF THE GREAT learning content being built today is done for free, by the community. Blogging, podcasting, wikis, reviews, favorites, recommendations, opinions — it's pretty hard to believe that you can't either borrow or support your community as it creates the learning it needs.

QUIT OWNING LEARNING CONTENT

FOR A GREAT EXAMPLE of this, search no further than the Wikipedia. Great content, owned by

the community. Vetted by the community. Updated and revised by the community. Why in the dickens would you want to own all this? And take the flack when you do?

QUIT SELLING LEARNING CONTENT

YOU PROBABLY have all sorts of metrics that you provide to management, so you can keep making contributions to your 401-K. Like "ROI", "impact", "eyeballs" — and more meaningless stuff that someone told you to track. How about if you asked the learners to rate the content and review it? The good stuff floats to the top, and the bad stuff goes down the drain.

I think we could have some fun talking about the implications of throwing out your existing business model and trying
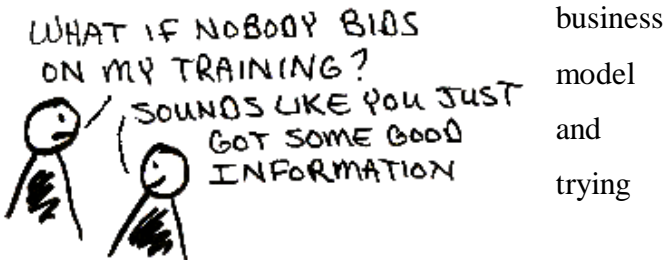
something new. How about you? Are you ready to

really look at how you're managing the knowledge
products you create?

MANAGE YOUR CONTENT LIKE RADIOHEAD

THE RECORDING INDUSTRY is in upheaval. File-sharing, downloads, copying, live unauthorized recordings — their model of pay-for-play is vanishing faster than a $99 airfare. Many companies and groups are clinging to the past, via lawsuits and threats. Others are looking for new models and doing some interesting experiments.

Like the rock group Radiohead. They've left their label, and are releasing their newest album for free, on the net. All they ask is that you pay whatever you'd like. No ads on MTV, no distribution costs, no glossy CD covers, and no money for their traditional recording label. What

would it look like if your Learning Department tried out this sort of a model?

DRAMATICALLY LOWER COSTS

No more binders, colorful covers, smiling trainers, posters, nametags or coffee urns.

DRAMATICALLY FASTER AVAILABILITY

Finish your content, put a PDF up on the web. Done.

DRAMATICALLY EASIER DEMONSTRATION OF VALUE

You could show your executives that some content was valued highly, and that some was not. Then either eliminate the junk nobody valued, or find someone who wanted to sponsor it.

DRAMATICALLY HAPPIER LEARNERS

Nobody will have an issue with something they pay for only if they like it.

DRAMATICALLY DIFFERENT YOU

In this new world, you'll get immediate feedback on what you're providing, and have immediate

demonstration of the value (or lack thereof) that you add. If that scares you, it probably should.

So — does that rock your world?

WHAT CAN YOU LEARN ABOUT LEARNING —FROM "CHAT HELP"?

I'M TRYING TO give a certain international training organization hundreds of dollars for the privilege of attending their event — in the hope of learning something (maybe) and getting in front of potential clients (maybe). But they've created a wonderful new website just for me and it won't let me log in.

So I clicked on the "live chat" button and am talking with a very nice woman whose name is probably not actually "Shannon." I both love and

hate these things, as they're obviously at the bottom of the customer support food chain. But it's usually easier than trying to get an actual human to answer via email. But this one has a twist — I can rate her skills in real time!

There's a little tiny set of feedback links — a green "plus" and a red "minus". I'm not sure if my repeated clicking on the minus button actually added up, or if it was like hitting the elevator button over and over again. Then again, it may just be a meaningless link to make me feel better.

Actually, I stopped when I realized that my feedback was about their whole system, not about Shannon. Now I feel guilty, assuming that there's one more person out of a job in Bangalore. And it's all my fault.

What would your learning efforts look like if this widget was at the top of every piece of content, and the results were sent — in real
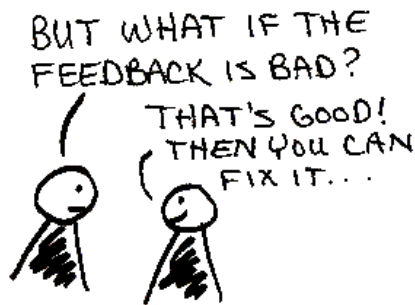
time — to a dashboard in the VP's office? Or saved in a folder for your yearly review? Or pushed out to an LCD screen on the wall above your cubicle?

What other questions would you ask? Here are some of mine:

- Are you happy to be involved in this learning?
- Are you doing other work while learning?
- Will you use this in your job?
- Is this a stupid waste of time?
- Are you just clicking until it's over?
- Would you rather be having a root canal?
- Does this fit your definition of "torture"?
- Would you do this to a terrorist?
- Does training matter to you, at all?

I dare you. Ask some of these questions — so much of our efforts to train (or encourage, or educate, or certify, or evaluate) fail because the audience just doesn't value or understand why we're being so mean to them.
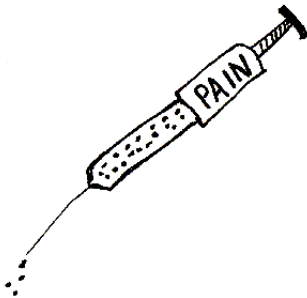
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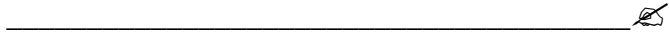
If you get good answers to all of these, THEN we can talk about instructional theory and quality interactivity.

RULE #1: DON'T CAUSE ME PAIN!

LOSING FOOTBALL COACHES always talk about how they didn't deliver on the fundamentals. I've been annoyed, lately, by the number of web interactions that seem to fail on the very simple metric of pain. The more pain you cause me in your process, the less likely I'm going to complete the experience.

It's often the little things that are just completely unnecessary, that some coder or anal-retentive type thought would be a good idea. So just

to make sure that nothing could possibly go wrong, they put up a silly barrier.

EXAMPLE #1: ENTERING THE "YEAR" FOR MY CREDIT CARD

I BUY LOTS of stuff online (well, too much) and each time they want to know the month and year of my card expiration. OK, fair enough. Buy why must you make me enter a four digit year? I lived through the Y2K non-event, and I understand the issue. But wait a minute — is it possible that my card actually expires in 1910? 3010? Not Freakin' Likely!

So just write a little script that lets me enter two digits, and then adds "20″ to the front. I can't imagine that we'd have a lot of trouble in the next several hundred years.

EXAMPLE #2: PHONE NUMBERS

I OFTEN FIND an online form errors out because I entered a dash in my phone number — the way the entire world does — and the system wants only numbers. (Don't believe me? Try to log in at T-Mobile!) If your developer can't write a script that

filters this, fire him/her and I'll get you one with a brain.

EXAMPLE #3: SKIP TO NEXT FIELD

WHEN I'M ENTERING a series of items (like a software serial number) and you have five fields, after I enter the first characters the entry point should automatically skip to the next field. Again, if your dev says "no" just give me a call — operators are standing by.

_____✍

How are you performing on the fundamentals?
What grinds your gears?

HELP! HELP! I'M LEARNING AS FAST AS I CAN!

I'M LOOKING AT some trade shows to attend this year. One of the themes that I see is speed — rapid learning development, just-in-time learning, learning at light speed, peer-to-peer learning, telepathic learning. (Well, ok, I haven't seen that last one — yet.)

I've built a lot of learning over the years. Some fast, some half-fast. But we may be losing sight of one of the key principles of learning. It's not how fast you shovel it into the sack, but how neatly it's packed.
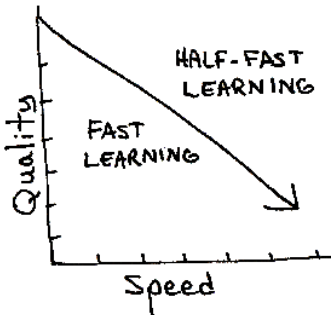
Malcolm Knowles certainly said it more elegantly, but just throwing a bunch of information into somebody's head is pretty pointless unless they can process it, relate it to what's already in there, and be able to apply it in future situations. I spent twelve years in school having various things pushed into my little skull of mush (fractions, capitols, chemical formulas) that I couldn't apply at all today. They tell me I was "learning to learn" when I complain about those wasted years.

In the 1980's, one of the most popular corporate learning experiences was a "Ropes Course". A bunch of suits were taken into the forest and required to climb up into a web of ropes between trees, passing each other back and forth to learn teamwork. (Regrettably, few took the opportunity to drop vice-presidents on their pointy little heads.) Not a lot of research was done on why (or if) this was effective as a learning model, but it was very effective in moving money from corporations to people who tied ropes to trees.

When actual research was done, it turned out that the learning happened almost entirely during the "processing" part of the experience, done on the ground after the dangling and passing. People were led through a discussion of how decisions were made, what they learned about using different skills, how they'd apply this to their work environment, etc. An experienced facilitator could really provide a great outcome that ended up giving a team some very useful experiences.

But the funny thing was that you could get this same result by doing all sorts of other things — passing eggs in spoons, tossing hamsters, or relay-slinky competitions in tall buildings. (Ok, I'm being silly. Sue me.) Turns out that the actual experience wasn't all that important, but the processing of the experience was the key.

So we proudly trumpet that we're shortening the learning process

and being more and more efficient. We only give people the nugget of information they need at the moment they need it. Knowledge comes from a peer, with no filter or validation. We're letting the learners decide whether they even need the learning.

It worries me. We're not really allowing any time for processing, here. I'm getting on (yet another) airplane in a couple of days. Which of these two pilots do I want at the controls:

#1 Completed all training faster than any student in the history of aviation

#2 Has been flying for fifty years, has made some mistakes, and had to crash land once when the engines failed.

_____✍

Are you learning too fast? Do you need to toss a few more hamsters?

BUT HOW DO YOU GET THEM TO USE IT?

I SPENT TIME yesterday talking to some folks at a local college, trying to convince them that they should pay me an outrageous amount of money to get their portal site up and running on MOSS. (Not the fuzzy green stuff, but Microsoft Office Sharepoint Server.) Like many organizations, they'd had no trouble installing the software — in fact, they'd had an earlier version three years ago. But the issue was getting the people to use it.

Organizations are all about collaboration tools, these days. The demos show happy employees sharing their IP, working together and easily accessing information across a seamless series of

tubes. Everyone is smiling, every document is immediately available, and all their slacks are creased right down the middle.

Moss

I'M NOT SURE where these people work, but I've never been there. In the real world, actually getting the employees to use collaboration software is by far the most difficult challenge in any roll out. Installation is pretty much a matter of clicking on some wizards, or writing a relatively small check to some guy who logs in remotely to your server. It costs a little more if you actually want someone to ask some questions about how you're going to use it, but that doesn't happen very often.

So these folks had some experience with the fact that many SharePoint installations didn't really end up the way they had hoped. Some groups used them, some groups absolutely refused to, and some groups lost entire days of work when things went wrong. People weren't always happy about the idea that anyone/anywhere/anytime could look at

everything they did. Or that it could be changed, deleted, or "borrowed". Kind of like having your desk in the hall.
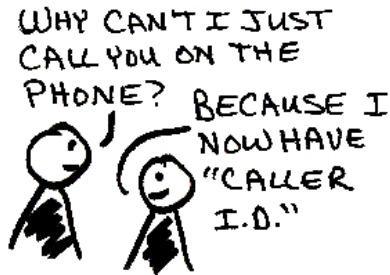
Add to that the fact that early versions of SharePoint (and most of its competitors) had frequent problems with access, stability, backups and just plain usability and you can understand why there were issues. If the can of soup you put in your kitchen cabinet vanished one day, and the next day you couldn't even get the door open — you'd probably start leaving the can out on the counter.

But let's get back to me and all that money. I told them that the only way I'd found to get people to engage with a community tool was to focus on pain. (Not causing pain, although that might be an option.) I recommend finding a way to eliminate pain for the user.

Here's an example. If you're an IT Admin, make a list of the top five calls you get every day. Probably looks something like this:

1. How do I reset my password?
2. Is my email server up?
3. Where is the RAS software?
4. How do I reach the helpdesk?
5. When is the tech scheduled to arrive?

I recommended that each Sharepoint site at their College just identify the top five issues, and create a dropdown list with links to the appropriate answers. Put the dropdown at the very top of the home page on their site. When a user calls, emails or sends a carrier pigeon — DIRECT THEM TO THE SITE. Use a clear, friendly URL — "ITHELP" not:

\\college\datastore\obscure\unknown\confusing\23kks?@3)

BENEFITS:

- You've just eliminated 80% of your calls and emails

- You've taught your users that they can get immediate help on Sharepoint.

- You've taught your techs to put answers on Sharepoint

- You've made yourself look like a very smart dude or dudette

But how about the things the college administration wants people to go to the site for — policies, reports, meetings? I probably shot myself in the foot — but I said that was Organizational Development — not something that I could fix with a community tool. (Unless the president said they'd be fired, or offered a bonus of $1000 per visit.)

Once you've got people participating in a community, they'll start coming back. When they need some meeting minutes, or an obscure answer — they'll go to your node and try a search. If you've got meaningful file names and good tags, they'll probably find what they need. (I'd sure rather do that than play voice-mail tag or wait for you to respond to my email.)

I don't know if I'll get the gig — I'm pretty blunt and outspoken, and that puts off some people. But I feel that I owe it to a client that I'm honest about what can and can't be accomplished with their money.

_____✍

Think positive thoughts for me.

I WANT MY DOCTOR TO BE ARROGANT

WHEN I GO in for major surgery, I want my surgeon to be arrogant. I'd like him to truly believe that he's the best there is at this procedure and that I'd be a fool to go elsewhere. I'm not even sure that I want him to spend a lot of time trying to explain to me, a rookie, exactly what he's going to do or why.

> *Early in life I had to choose between honest arrogance and hypocritical humility. I chose honest arrogance and have seen no occasion to change. — Frank Lloyd Wright*

As I board a 767 for a flight on a stormy day, I want my pilot to be arrogant. I want her to bristle at any implication that she can't fly the socks off of

every single male pilot in the company, with one manicured hand tied behind her back. And I really don't want her to spend any time trying to make sure I'm comfortable with the route she's planning or how much fuel is on board.

> Timing and arrogance are decisive factors in the successful use of talent. — Marya Mannes

When I'm in a burning building, I want that fireman to be arrogant. I'd like him to believe that he is faster, braver and more skilled than anyone else on the truck. That no matter how dire the situation looks, he'll be able to get me out and keep me breathing. And I really don't want him to spend any time considering whether I understand how pumper trucks work or what's the best way to wield the ax.

> It ain't bragging if you can back it up. — Dizzy Dean

I was told, this week, that I lost a bid on a project because the client felt that I was arrogant.

That I hadn't spent enough time listening to them, understanding their situation, and really explaining exactly what I'd do and why. And I've been thinking about this.

It's a valid complaint. I probably did come off that way. Even though well over half of the time we

spent together was taken up by the principal just rambling through his thoughts on the situation in general, as the rest of his team sat mute. Even though the problem they had was no different than any other org that was attempting to spool up on that product.

DUCK

I'VE GOT a pretty decent resume on doing exactly the type of work that they were looking for, in some pretty big ponds. Theirs was a very small pond. The fact that I didn't spend a lot of time

asking detailed questions (and turning every single duck in the pond upside down to see if it had feet) must have emphasized that. The fact that I didn't sound worried about taking on the project, or worried about success, or really even worried about whether or not they wanted to hire me probably did come off as arrogant.

At the end of the day, though — being honest (as Mr. Wright recommends) helps me avoid projects where the client and I won't mesh well. This group obviously wanted to be very involved in decisions, have me spend lots of time communicating with them, and make sure that they were on board with each choice that I made as we went along. They just weren't going to be comfortable to get on the airplane, lay down on the gurney, or climb down that ladder on my say-so alone.

That's certainly their option — and I do have a model where I'm willing to do projects like that — but clients don't usually sign up.

*If you want to help me do the job, I'll have
to charge you double. — Dick Carlson*

Now before you start posting comments about how I should just be nicer, or not show this arrogance to the customer, or "pretend" that I'm really interested in how they want the systems managed — tell me the truth.

When the engines flame out, who do you want to land the plane? And do you want them to be arrogant?

_____ ✍

ar·ro·gant /ˈærəgənt/ –adjective

> 1. *making claims or pretensions to superior importance or rights*

HE WHO FAILS FASTEST, WINS

THERE'S A CONCEPT in software building called "agile development." In simple terms, it means that you don't spend a whole lot of time making a huge complicated plan of every little detail of the whole finished product. (This is pretty counter-intuitive, and really makes most people pretty nervous.)

Here's one way to think about it. If you're going to go to DisneyWorld, you could spend a year reviewing brochures and maps of the entire kingdom. Plot your course, exactly which rides you're going on at what time, where to eat, and how much to spend at each gift shop. Then when you got

there you would just measure your success by how well you kept to the plan.

Another way to do it would be just get in a car and drive to the park. Your goal would be to have fun, see the sights, and come away with some good memories. Each day, you'd huddle with the other members of your group and exchange experiences and talk about what you'd like to do next. Most likely, you'd find that many of your early ideas had changed. Some parts of the parks were just not as interesting as you thought. Some were much more interesting.

So day by day, you'd make minor course corrections in the plan — all based on constant feedback from the users. And each round of review would get you closer to that goal of "good memories" that you had at the beginning. Incorporating nearly constant feedback would make sure that your ultimate goal was reached — and your willingness to be flexible and not tie yourself to a rigid plan made months ago would ensure that you could get to the goal.

So how might we apply that to learning? Take a look at how most of us approach courseware design. We perform a needs assessment, create some kind of functional specification, develop a design

document, a development plan, do a little production and quality control, create a version 1.0 and send it through edit and stakeholder review, and then finally release it to the learners. By that time the thing is pretty fully baked, and only major problems are going to get addressed.

How about if we just set some major goals — "learners can apply sound lending principles to home mortgages" or something like that. Then we create a quick module, roll it out to some learners, and get feedback. Our stakeholders give the feedback review, we incorporate it, and do another loop. Each cycle brings us closer to a product that

meets our goal, and our quality improves with every evolution.

Set down your laptop, and head outdoors. Take a look at how ants build an anthill. They pile up the grains of sand in a pretty organized fashion, but as obstructions appear the hill may take on a completely different shape than what you might expect. But they reach the goal.
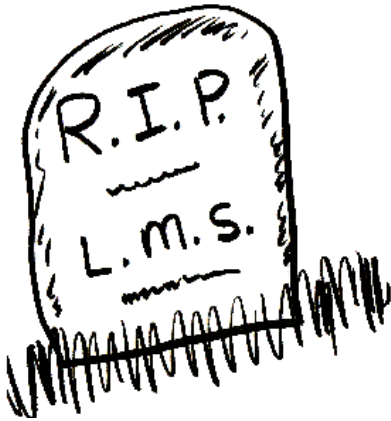
PUTTING LILIES ON YOUR LMS

IT'S ALMOST EXACTLY one year since I announced the death of the LMS in a post on this blog, and (in a phone conversation yesterday) I found myself talking about my theory one more time with a nice woman who was willing to give me introductions to lots of people who might hire me. I guess I'm a fool.

Many of those companies would probably be willing to write long-term, high-dollar contracts to have me build strategic operational implementation visions with rich functional specification

statements, describing best practice drivers to manage all critical metrics involving the success alignments contained in a world class deployment of their mission critical Learning Management System. Or something like that.

The truth is, from my point of view, that you can no longer "manage" learning in any meaningful sense. Yes, you can manage memorization. Make people go through a series of e-learning screens on your HR policies and then do a multiple-choice quiz — but that's not learning. You can make people watch videos of sexual harassment role playing and then identify good touching and bad touching — but that's not learning. You can make people click and drag parts of a hamburger onto a bun and hear music when they do it right — but that's not learning.

Learning happens when someone can actually successfully apply the knowledge in a real life situation. And measuring that is incredibly expensive, time consuming, and difficult. I rarely see it happen, because in almost every case it proves that your training was pretty useless.

And actually, that memorization stuff really doesn't last very long, anyway:

Example 1: Name the capitals of all 50 states

Example 2: Recite the Ten Commandments

Example 3: Set up speed dial on your cell phone

What an LMS is very useful for is tracking that people experienced the process of hearing and/or seeing information. For privacy training, sexual harassment training or Sarbanes-Oxley this is critical to the organization's legal future. "Why, yes, Your Honor. Mr. Frisbee was given complete training before he drained the widow's and orphan's fund. We're completely innocent."

For giving people context (french fries go in the oil before they go in the cardboard box) it's just fine. But to actually impart knowledge and/or skills that will stick in a meaningful way, most of what an LMS measures has very little to do with learning. And since most learners today don't really learn in a linear fashion, they just click through

the course or game the system to comply with your requirements. So you're really not measuring anything, anyway.

(If you want to have some fun, offer a $1000 prize to the first person in the org who can find a way to game the system into thinking that he or she has taken every single course. But be prepared to be embarrassed, big time.)

My problem is that I really love learning. I spent a lot of time (and money that I'm still paying back) getting skilled in how to really make it happen. Sort of like a welder who really respects a solid bead between two plates, I'm troubled by something that just looks nice but really doesn't make the grade. And like that welder, it worries me

that people are taking money (and sometimes a lot) for a structure that will collapse at some point.

_____✍

When that happens, all of us will be blamed.