TRAINING DESIGNER’S GUIDE TO SAVING THE WORLD

6 STEPS TO RELEVANT, POWERFUL TRAINING
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Do you want to create training that has a real impact on the world? If so, you’re in the right ebook. You’re six steps away from creating lean, lively instruction, and this first step is the most crucial.

Step 1 could be called “disobey.” That’s because many of us are expected to work like this: A client (internal or external) comes to us and says, “My team needs training.” We say, “Okay!” and we obediently create the kind of training they want.

However, unless your job title is “Faceless Worker on the Course Production Line,” your job is not to create training on demand. Your job is to **improve people’s performance** so the
organization meets its goals. Training is just one way to improve people’s performance, and if it’s mis-applied, it won’t work.

There are a bajillion problems that training can’t solve. So while your job is to create training, your job is also to **not create training** if it won’t work. Instead, you’ll help the client find solutions that really will work, such as new job aids, improvements to procedures, changes to the work environment....

The client who just came through your door has a problem that at least in part can’t be solved through training. They just don’t know it yet. So your goal in step 1 is to distract them a bit from training and get them talking about the problem. You want to win the chance to analyze the problem so you can identify the bits that really can be solved with training and save everyone from a huge waste of time.

The client came in thinking, “I’ll get an online course with narration based on the 187 slides we used at the conference last year.” You need to change their thinking to, “I’ll get a solution to this problem that’s been dragging down the whole department.”

Let’s practice. Your client says, “I need an online course on widget wiggling for my customer support people.” Which of the following responses will give you the chance to grab the steering wheel and prevent a training Titanic?

- a. “When do you need it?”
- b. “Do you have content for it?”
- c. “Have you considered face-to-face training?”
- d. “Why do you need the course?”

The magic word for step 1 is **why**. Use it in all its forms, and take full advantage of your role as a clueless outsider who earnestly wants to understand the client’s pain. Your job is to get the client talking about the problem so that in future steps you can pull more specific information out of...
them. Don’t let the client say, “Online course, please,” dump a stack of PowerPoints on your desk, and walk out.

Here are some questions that can get the client to stick around and talk with you:

• “What problems are you seeing?”
• “How long has it been going on?”
• “What have you tried in the past?”

Again, your goal is to get the client talking and to position yourself as someone who wants to solve their problem. You’re moving yourself from “training developer” to “performance consultant.”

To practice this first conversation, try this interaction on my blog. And for a dose of the gumption you might need to question your client, check out the L&D manifesto.

### Dealing with challenges

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<tr>
<th>Challenge</th>
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<tr>
<td>Your job title really is “Faceless Worker on the Course Production Line” or close to it.</td>
<td>If you were hired as a course developer but want to improve the quality of your projects, your best remedy really is to gently take the reins of a project and educate your client as I’m describing here. This might include educating your boss as well. Sometimes you just need one good win, and then future clients will come wanting what you did for the previous one.</td>
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Now that your client is actually talking with you, your next challenge is to get them to identify a measurable goal for the project. This goal should be an observable change in the performance of the organization that your project will help bring about.

You need to do this for two reasons:

1. It helps your project actually have an impact.
2. It makes analysis and design much easier — once you have a clearly focused goal, it guides every other decision.

For the goal to work, it needs to be specific, measurable, and time-bound.
Some examples:

- "Technical support calls about the database will decrease 10% by 4th quarter."
- "New payroll staff will correctly process payroll within two weeks of their hire."
- "Ethics violations will decrease X% by YYYY."

Chances are, your client has only a vague goal that isn’t tied to a performance metric. They’re probably thinking something like, “My goal is to train everyone in how to use the database by September.” How do you get them to identify a measure that shows how you’ll improve the organization’s performance?

These questions can help:

- “What are you currently measuring that’s related to the problem?” (support calls, error reports, rejected records, customer dissatisfaction, turnaround time...)
- “How will this measure change if our project is successful?”
- “If you’re not measuring anything now, what could we conceivably measure?”
- “How will we know we’ve succeeded? For example, what will change on our quarterly report?”

If your client wants training on “soft” skills, like collaborative management techniques, they might assume that there’s no way to measure it. However, if the company uses a performance appraisal system, there could easily be a relevant score already in use. And here are other measurements that could be useful, depending on the “soft” skill being targeted:

- Employee engagement survey results
- Employee retention rates
- Customer satisfaction ratings
- Absenteeism
- Legal complaints
**How long does this take?** Usually, it doesn’t take long. I’ve helped clients not only establish a solid goal but also complete the next step in one two-hour call.

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<td>The client just wants people to &quot;be aware&quot; of something.</td>
<td>Ask,</td>
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<td></td>
<td>• What will change when people are aware of it?</td>
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<td></td>
<td>• What will go wrong if they’re not aware of it?</td>
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<td></td>
<td>• How can we tell looking at the performance of the unit that people are aware of it?</td>
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<td></td>
<td>• If Bob is aware of the thing and Jane isn’t, how can we tell by watching them do their jobs? How does that affect the performance of the organization?</td>
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<td>• See some more ideas <a href="#">here</a>.</td>
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<td>The client is reluctant to say that the project will improve business performance.</td>
<td>Emphasize that your project isn’t going to create the change all on its own. It’s part of a larger business strategy (or it should be!). If necessary, word the goal as &quot;Contribute to [business goal].&quot;</td>
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Now that you’ve established a goal, your client might say, “Great, now we know where we’re going. Here’s the information that will get us there. Please turn it into training.”

However, stuffing information into people's brains probably won’t achieve your performance goal. Even if people know something useful, that doesn’t mean they’ll do something useful. **Action, not knowledge, changes business performance.** So we first need to identify what people need to do to reach our goal, before we talk about what information they might need.

This step has these extremely useful side effects:

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• It keeps everyone focused on performance change, not information. This weakens your client’s obsession with their existing content and reduces the likelihood that they’ll insist on an information dump.
• It will help you identify useful practice activities, if training really is needed.

This seems like a good time to bring in action mapping. It’s a visual way to keep track of your goal, necessary actions, and training materials or other solutions. At this point, we’ve identified a goal, and now we’re identifying the real-world actions (on-the-job-behaviors) that people need to take to reach that goal. A simple map could look like this:
Examples of actions

Actions are specific, observable behaviors, such as:

- Choose the correct category for each new client in the database.
- Replace the dortlong when its parametizer turns blue.
- Respond within 24 hours to complaints about site performance.
- Encourage the team member to describe their career goals on their own, without telling them what would be best.

All of the above are behaviors that an observer could see and record. The following aren’t actions and don’t go on your map:

- Appreciate the different perspectives brought by diverse employees.
- Understand the importance of protecting data privacy.
- Be aware of the legal risks of plagiarism.
- Feel more comfortable using the database.

While appreciation and understanding can motivate people, the only thing that affects business performance is action. That’s our focus right now.

If you’re used to writing performance objectives, this step probably looks familiar. However, we’re ruthlessly focusing on observable behaviors that occur on the job. We’re not including “test” behaviors like “Define empathic facilitation” unless the person actually needs to stand up on the job and recite the definition. Instead, we’re looking for something like, “When leading a meeting, encourage participants to share their emotions as well as their ideas.”
# Dealing with challenges

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<td>You have a huge number of actions.</td>
<td>• Have your client or subject matter expert identify the most common mistakes or highest-impact behaviors and focus on those.</td>
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<td>• Is your audience too diverse, covering too many different jobs? Consider breaking your analysis and project into different modules for different jobs.</td>
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<td>• Are your actions super-specific, where one training activity could easily cover several actions? Consider grouping them.</td>
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<td>You have only 3 or 4 actions.</td>
<td>• Have you broken them down enough? Consider limiting each action to what someone can do in 20 minutes on the job.</td>
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<td>• Is one of your actions “follow the procedure?” Break it down into the major steps of the procedure, so you can identify which steps need which type of help.</td>
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So far, you and the client have identified a measurable goal and listed what people need to do to reach that goal. This might have taken a couple of hours if the project was decently focused to start with. Now, your client is deep into analyzing their problem, and it’s the perfect time to help them find the best solution to each aspect.

The easiest way to break it down is to **focus on one action at a time** and ask, “Why aren’t people doing it?” You might consider whether the problem falls into one of these four categories:
• **Environment:** Buggy software, unsupportive management, disorganized manuals, inefficient procedures, a stressful company culture — the environment is everything that creates the world in which the employee works. Training is unlikely to fix environmental problems unless the problems are created by trainable behaviors, such as heavy-handed management.

• **Knowledge:** If the employee simply doesn’t know some fact that they need to know in order to perform the action, congratulations, you’ve got yourself a knowledge problem, one of the easiest problems to fix. However, don’t assume that the fix is training. Often, a better solution is a quick reference or other job aid that’s on hand when the employee needs it.

• **Skills:** For example, the client’s team members tell you that it’s hard to optimize ledfars, but once you have some practice at it and know some tricks, you’ll be optimizing like a whiz. This is another relatively simple problem, and it could be well-suited to some type of training.

• **Motivation:** Be careful with this. It’s common for clients to complain that team members simply aren’t motivated, but often their lack of motivation is a side effect of one of the three preceding types of problems. If you harangue me to work quickly but make me use slow, buggy software, I guarantee I will be unmotivated, and no amount of training will fix me. In the rare instance that the problem appears to be purely a motivational one, it’s possible that some type of messaging could help, but there’s zero guarantee that training is the best way to deliver that message.
Your goal: Target the solutions

You’re taking the time to find the “why not?” of each action because you want to create powerful, targeted solutions. By finding the best solution to each individual problem, you’ll create the most lean and effective solution overall.

For example, let’s say that your client is a huge law firm. One action they need is for people to enter the correct code in a database to record a new client’s situation. For example, a client who is suing a doctor is a code XG. There are a lot of codes, and the only time people need them is when they’re sitting at the computer entering a new client in the database.

The traditional “training” approach would be to walk through each code in an online course or face-to-face session and then practice applying them as if they needed to be memorized. But they don’t need to be memorized. Why not just have them pop up in an easy-to-read reference on the data entry screen and skip the training altogether?

These are the kinds of quick wins you’re looking for. You want solutions that remove the need for training — you’re solving problems with job aids, improvements to procedures, changes to how software works.... Then, finally, what remains are problems that really are best approached through training, plus a few problems that no one involved in the project can solve.

This is easier than it sounds. There’s an 8-minute walkthrough of an example on my blog, complete with a handy flowchart.

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## Dealing with challenges

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| You’re not sure if a knowledge gap should be addressed through training or a job aid. | • If the people performing the action should memorize the information, provide it through an activity that helps them practice recalling it (in other words, training). If they don’t need to memorize it, a job aid or other performance support is a better solution.  
• To decide if they need to memorize it, consider: Do the people performing the action need to do it quickly and often? If they have to stop and look something up, will their workflow or credibility be affected? If you answer yes, you should help the workers memorize and recall the information in realistic simulations. |
| Your analysis reveals that training isn’t likely to solve any part of the problem, but you’re still required to deliver a course due to an intractable political situation. | • Try to identify some behaviors that could have an effect, however small, on the problem, and focus your intervention on those.  
• For example, if the problem is cultural, such as high-pressure management, identify some behaviors that could improve that culture, and target those. |
You’ve identified what people need to do to reach your goal, and you’ve found several ways to help them do it without training. Now, finally, you’re down to a few on-the-job behaviors that will probably benefit from some type of training. What will that training look like?

Your client might be expecting it to look like this:
That’s the classic information presentation followed by a “knowledge check” that tests whether learners can recognize a factoid they were exposed to 30 seconds ago. But you haven’t come this far just to create a passive presentation.

Knowledge alone won’t reach your goal. People have to take action. Your goal now is to help them practice that action. To do that, you’re going to design experiences, not information.

Instead of presenting a bunch of information, you’ll plunge learners into a realistic activity that contains the information they might need. For example, if in the real world the necessary information is in a job aid, don’t put the information in your course. Leave it in the job aid and design an activity that has learners practice using the real-world job aid.

Here’s an example. This course on needle safety doesn’t start with “You should always rinse a needle injury with blah blah blah.” Instead, it immediately puts learners into a realistic situation. The information is optional and includes the real-world job aid (the sharps poster).

Magda has received a deep prick from a needle she removed from a patient’s artery. What should she do first?

- Let the wound bleed freely.
- Suck blood from the wound with a syringe.
- Pour Betadine on the wound.
- Report the injury to Incident Control.
This sort of activity obviously doesn’t require high-end technology, and it works in face-to-face training, too. The main differences from traditional training design are:

- We don’t present the information first.
- Instead, we throw learners into a realistic simulation of the kind of decision they have to make on the job.
- We make the information an optional part of the activity, ideally in the format the learner will use on the job.

Here’s another difference: We don’t preach at people in the feedback. Instead, we just show them the result of their decision, and they figure out like the adults that they are whether their decision was a good one.

For example, let’s say that a learner in the needle safety course has been working at the hospital for awhile. “Everyone knows you should pour Betadine on a wound,” she thinks, without looking at the sharps poster or SOP. So she says that Magda should pour Betadine on the wound.

Here’s the feedback she gets. It describes what happened as a result of her decision and shows where on the job aid she should have looked.

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Traditional training would say, “Incorrect. You should do X instead.” But how memorable is that? It’s more memorable — and realistic — to infect Magda with Hepatitis C.

This sort of design helps people **learn from experience** in a safe but realistic setting. It also makes the material feel like a stream of activities, rather than an information presentation.

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**Scenarios**

You could call the needlestick activity a **mini-scenario**: It has a realistic setting, a character with a name, and a decision that has consequences, but it’s limited to one or maybe two scenes. Mini-scenarios are great for the vast majority of activities in which you want people to practice making decisions.

For more complex situations, you might want a **branching scenario**, in which different decisions lead down different paths, each with multiple scenes. Branching scenarios are useful if your learners need to:

- Change attitudes or assumptions that affect how they behave in complex situations
- Recover from mistakes in a long or complex process
- Make decisions in extended, ambiguous situations
- Decide when to stop gathering information and act
For example, in this branching scenario for the US Army, we wanted to help soldiers develop their ability to see from the perspective of another culture and to practice recovering from mistakes made in an important conversation. One-scene mini- scenarios wouldn’t have let us do that.

Finally, scenarios don’t have to be slickly produced to do the job. Here’s an example of a text-only scenario produced using a simple HTML tool. For more ideas, see the activity design category of my blog.

Here’s how a simple action map could look at this point. In this example, we’ve brainstormed an activity idea for the on-the-job behavior “Identify the widget that best meets the customer’s needs.”

The activity will include two types of information. We’ll offer optional information listing the basic widget features. We’ll help people memorize it by making it available in the first few scenarios but not in later ones. We’ll also include detailed specs by linking to the spec sheet that all sales people have on the job. This will always be available.
## Dealing with challenges

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| You have limited tools or time. | • Try a text-based mini-scenario or branching scenario. Novels have used it for centuries.  
• Show stakeholders a working prototype of a challenging but bling-free activity to get them to see that cognitive challenge is more interesting than bling. |
| Your scenarios are too easy. | • Focus on the grey areas; add realistic complications if necessary.  
• Focus on the mistakes that subject matter experts have identified as the most common ones and tempt learners to make those mistakes. |
| There’s no clear right or wrong answer; it depends. | • Create a model that will help learners make good decisions and have them apply the model correctly in the scenario.  
• Write realistic, specific scenarios in which some decisions will bring results that are clearly better than others.  
• Use multiple mini-scenarios to cover different situations or different shades of grey. |
You’ve found quick, in-the-workflow solutions for several problems, you’ve designed training for a few others, and I hope you’ve delivered everything by enlisting the support of managers. And by starting with a measurable goal, you’ve baked evaluation into the project from the start.

Use that goal to check how well your solutions seem to be working. In addition to looking at the change you and your client wanted to create, also consider more qualitative reports. For example, what do managers say about the change in performance?

Also, take a tip from Robert Brinkerhoff’s Success Case Method and run a broad survey to find two groups: people whose performance has improved markedly, and people whose performance
hasn’t improved. Talk in depth to representatives of both groups to figure out what worked and what didn’t.

Since many of your solutions are actually new job aids, tweaks to procedures, or other changes in the workflow, you can improve them on the fly. For example, if your interviews reveal that one of the new job aids is hard to use, within hours you can put a better version in use. For this reason, don’t wait until your goal date to start your evaluation. Start talking to people soon after the solutions are in place so you can improve them as soon as possible.

Finally, once you’ve gotten your results, share them. Write up a brief report summarizing the problem, the solutions, and the resulting improvement in business performance. Share what you learned so future projects can be more successful — and so future clients come to you looking for performance improvement, not just “training.”
There’s more!

Ideas & workshops for training designers: cathy-moore.com

Hands-on guide to designing lean, lively elearning