How To Accelerate Learning Transfer Through Competency-Based Learning

Presented By: Cheryl Lasse, SkillDirector





Webcast Objectives

In this webinar you will learn:

- How to link competency models to existing learning opportunities
- How to use competency models to identify learning opportunities you need to develop
- How to keep your mapping current





Competency Models Power The Entire Employee Lifecycle

Why Competency Models?	What If I Don't Use Competency Models?	How Do I Get A Competency Model?
 Competency models have the ability to close skill gaps, increase engagement, drive retention, and also be used to Improve: Recruiting Onboarding Individual skill development Career planning Coaching Mentoring Communicating culture Developing a Learning & Development action plan 	 If you don't use them, you risk: A disconnect between learning investments and corporate strategy Learning programs that don't close the right skill gaps Frustrated and disengaged employees who still can't do their Job Skill gap guessing vs. actual identification (that will go over well with executives!) One-size-fits-all vs. personalized learning – you cannot implement personalized learning 	 If you don't have competency models because you don't know how or you think it's too much work, we can help. We can provide you with instruction and templates so that you can build them yourself. We can build <u>custom models</u> for you in weeks! You can use/customize <u>standard models</u>.

All about competency models / standard models: http://skilldirector.com/competency-models

The value of competency models:

https://www.td.org/Publications/Blogs/Career-Development-Blog/2015/10/What-Is-the-Valueof-a-Competency-Model

How to use competency models:

https://www.td.org/Publications/Blogs/Career-Development-Blog/2015/12/How-Can-My-Company-Use-Competency-Models

Develop an Actionable Competency Model in

Weeks!

Thursday, November 05, 2015 at 12:00 p.m. Eastern Time - by Cheryl Lasse

Sponsored By: SkillDirector

Register or Viev

n Comments

Think you don't have time to create competency models for the jobs you support? We'll show you an Agile methodology for getting them built in a way most likely to be embraced and made actionable.

Competency models provide a baseline that tells you what skill gaps exist and what development activities are needed. They intrinsically drive achievement motivation. They provide each person with a road map for how to be great. With the increased pace of change, fewer years of tenure in a job, employee desire for self-directed improvement and career development, and knowledge drain from retiring baby boomers, competency models are more necessary than ever to provide your organization or association with a competitive advantage.

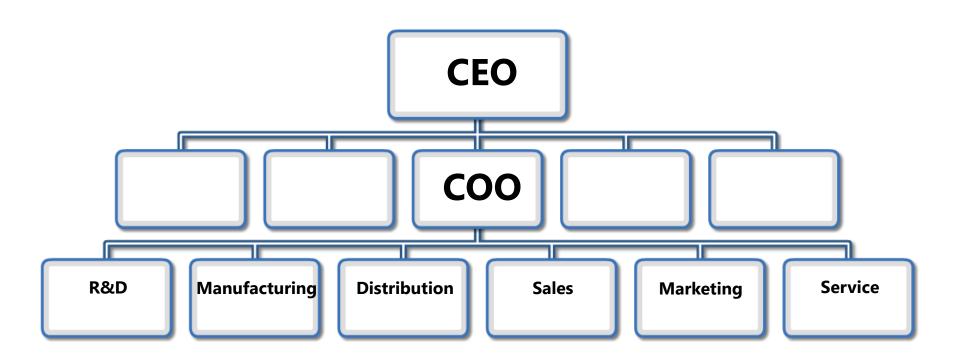
WEBINAR: How to create a competency model:

https://www.td.org/Digital-Resources/Webcasts/TD/2015/11/Develo p-An-Actionable-Competency-Model-in-Weeks

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Competency Models For Professional Dev	velopment		
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	ABOUT THIS GROUP		
Start a conversation with your group	This group is for those who want to discuss how to		
	create and maintain competency models and make those model actionable so they can be used throughout		
	the entire employee lifecycle.		
	Competency models have the ability to close skill gaps,		
Conversations Jobs	increase eng Show more		

LinkedIn Group where I can answer your questions

https://www.linkedin.com/groups/8467576

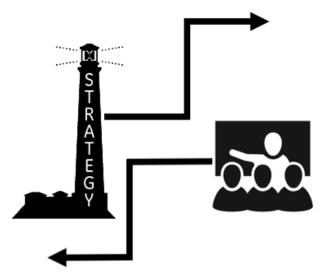






The competency model for each role defines the skills required to accomplish the strategy

How can you develop what your audience needs if you don't know what skills they should have?





Dan Pink: Drive <u>https://youtu.be/u6XAPnuFjJc?t=407</u>



A competency model describes what it looks like to be great in your role A competency model describes what each person in their role needs to be able to do, specifically, in order to perform their part of corporate strategy

...in order to execute the annual operating plan

...so you can be proactive instead of reactive



Consistently deliver customer-focused presentations

Critical to success

Rating	Behavioral Examples
5 - Expert	 Build templates and tools for enabling customer-focused presentations, capturing the motivation, needs and requirements of stakeholders Stakeholder profiles Lists of discovery questions Anticipate objections and proactively overcome them with data before the objection arises Craft a persuasive argument on-the-fly to neutralize dissenters Display Skilled behaviors
4 - Skilled	 Use a structured technique for enabling customer-focused communication Use discovery question lists Document profiles of each stakeholder, and update them as new insight is obtained Perform thorough research before building any presentation Anticipate objections Often able to sway others to a strategy that may have higher short term costs but more long term benefits Coach others on how to prepare and deliver customer-focused presentations Display Applied Knowledge behaviors
3 - Applied Knowledge	 Use a customer-focused approach to presentations Research the role and background of stakeholders before the presentation Ask probing, open-ended questions about their needs Ask "why?" Talk to peers about stakeholder motivations, needs and requirements Ensure every presentation has a purpose and delivers value to the recipient(s) Plan presentations to weave supporting data throughout to support recommendations and timing considerations Can prepare a concise, motivating and persuasive presentation Use clear and concise communication (e.g., bullet points, summaries, etc.) Emotional/inspiring visuals that support my message
2 - General Awareness	 Use the proper grammar and spelling in presentations Proof my work before delivering Can prepare a complete, logical presentation Gather appropriate supporting data Have supporting available should the need arise – it's presented as support
1 - Limited Awareness	 Focus on the speed of preparing a presentation, more than the quality Am great at "winging it" - can deliver a presentation, state my position, or write others without much preparation

What is a competency?

https://www.td.org/Publications/Blogs/Career-Development-

Blog/2015/11/What-Is-a-Competency

Steps we'll cover

What it means to map competencies to learning



The steps to map competencies to learning

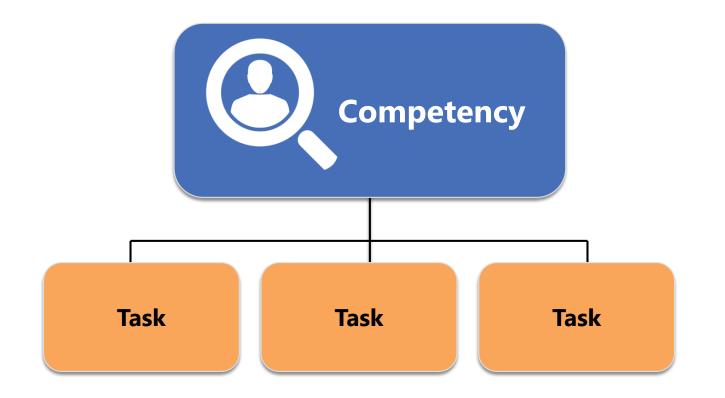


Filling gaps



Keeping your mapping current

~10% Formal Learning (classroom, eLearning, webinars) ~20% Exposure ~70% Experience (on the job, skill practices, (social learning, coaching, mentoring and feedback) job aids, templates)



Consistently deliver customer-focused presentations

Critical to success

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Consistently deliver customer-focused presentations

Critical to success

Rating	Behavioral Examples
3 - Applied Knowledge	 Use a customer-focused approach to presentations Research the role and background of stakeholders before the presentation Ask probing, open-ended questions about their needs Ask "why?" Talk to peers about stakeholder motivations, needs and requirements Ensure every presentation has a purpose and delivers value to the recipient(s) Plan presentations to weave supporting data throughout to support recommendations and timing considerations Can prepare a concise, motivating and persuasive presentation Use clear and concise communication (e.g., bullet points, summaries, etc.) Emotional/inspiring visuals that support my message

	Behavioral Example	Learning Opportunity / Learning Objective
•	Use a customer-focused approach to presentations	Customer Focus course
•	 Research the role and background of stakeholders before the presentation Ask probing, open-ended questions about their needs Ask "why?" Talk to peers about stakeholder motivations, needs and requirements 	
•	Ensure every presentation has a purpose and delivers value to the recipient(s)	
•	Plan presentations to weave supporting data throughout to support recommendations and timing considerations	
•	 Can prepare a concise, motivating and persuasive presentation Use clear and concise communication (e.g., bullet points, summaries, etc.) Emotional/inspiring visuals that support my message 	Creating Effective Presentations course

For more on this, see "Driving Targeted and Robust Development". TD Magazine. December 2015. Harris and Terry.

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Example Skill Practice

Document Name: Example skill practice.docx Page 1 of 2

Learning Objectives:

- · Identify the needs and motivation of presentation participants
- Ensure every presentation has a purpose and delivers value to the recipient(s)

Instructions

For this activity, you should pick some presentation that either you have to give, or a peer will be giving. Identify the topic and the purpose (what you/peer want to happen as a result of the presentation).

Presentation Topic	
Presentation Purpose	
Attendees [Names &	
Titles]	

Step 1) Make a list of the questions you'd want to know about their motivations, needs and requirements in order to ensure you can accomplish the purpose. Be sure they are probing, open ended questions, and that you ask 'Why' if their answer requires more depth.

Question 1	
Question 2	
Question 3	
Question 4	
Question 5	

Step 2) Make a copy of the template for each attendee. If you have 5 attendees, you'll have 5 templates.

Step 3) Do your homework. Using any company resources, LinkedIn profiles, and your peers who have a relationship with this person, try to get the answers to the questions you've written. Use the template below to capture the details. Be sure to identify the source.

Step 4) Schedule 15 minutes with each of the attendees (one-on-one, in person or virtually) and ask them the questions – your homework should help you to be able to understand their position. Use the template below to capture the details from your conversation. It may not be possible to meet with each person.

Step 5) Identify how you will tailor your presentation (or how your peer should be tailoring their presentation) in order to achieve your purpose based on what you learned about the participants. Use the template below to capture your plans.

Note that you won't necessarily use this template the same way for all presentations, but it can serve as a good reminder for consistent presentation preparation, and to ensure that you capture the voice of your presentation customers.



Example Skill Practice

Document Name: Example skill practice.docx Page 2 of 2

TEMPLATE

Attendee: John Smith, VP of Sales

Homework:

Source	What I learned
LinkedIn	Says goal is XXX
Mary Brown	Says focused on YYY

Conversation answers:

Question 1	
Question 2	
Question 3	
Question 4	
Question 5	

How I will tailor the presentation

Be sure to include an overview on how this project will impact John's supply chain project and how it will integrate with his timeline, adding value to his project, as opposed to detracting from it.

Image of a sample skill practice, found in the materials you can download.

	Behavioral Example	Learning Opportunity / Learning Objective
•	Use a customer-focused approach to presentations	Customer Focus course
•	 Research the role and background of stakeholders before the presentation Ask probing, open-ended questions about their needs Ask "why?" Talk to peers about stakeholder motivations, needs and requirements 	Skill practice: Identify the needs and motivation of presentation participants
•	Ensure every presentation has a purpose and delivers value to the recipient(s)	Skill practice: Identify the needs and motivation of presentation participants
•	Plan presentations to weave supporting data throughout to support recommendations and timing considerations	
•	 Can prepare a concise, motivating and persuasive presentation Use clear and concise communication (e.g., bullet points, summaries, etc.) Emotional/inspiring visuals that support my message 	Creating Effective Presentations course

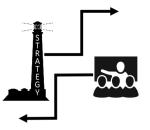


Essential if you want to ensure what you create or deploy...

- Is relevant
- Supports corporate strategy
- Creates the **best opportunity** for learning transfer to occur

It accelerates learning transfer because the individual performing the learning opportunity knows it's relevant and they buy into it.

What happens if you DON'T apply competency-based learning



Develop or Buy learning opportunities that don't support skills people need to have – WASTE!

Don't have learning opportunities that enable people to close skill gaps





Make it likely that someone who has a skill gap will consume content that won't help them, so they will become disengaged with L&D and try to close skill gaps on their own

Risk people will get frustrated with the inability to do their jobs, and will leave



The steps to map competencies to learning



Identify your learning opportunities and assets



Prepare your mapping template

Map your activities

Identify your learning opportunities and assets

3					
4	Job Title	Competency / Task Categon	Skill / Task 🎽	Behavioral Example	Required Proficiency
5	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Use a customer-focused approach to presentations	Applied
6	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Research the role and background of stakeholders before the presentation o Ask probing, open-ended questions about their needs o Ask "why?" o Talk to peers about stakeholder motivations, needs and requirements.	
7	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Ensure every presentation has a purpose and delivers value to the recipient(s)	Applied
8	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Plan presentations to weave supporting data throughout to support recommendations and timing considerations	Applied
9	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Can prepare a concise, motivating and persuasive presentation o Use clear and concise communication (e.g., bullet points, summaries, etc.) o Emotional/inspiring visuals that support my message	Applied
10	manayel	communication		support my message	

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1	Curriculum	Analysis											
2													
3										Optional F	ields		
4	Activity Cod *	Type [e.g., elassroom, eLearning, webinar, job aid, temptat video, checklist	Training Activity Name/Description *	Link To Activity, Asset, or person (regardless of where it is locate	Module Name (only if it is a part of larger activity)	Learning Objectives (this should not be a description it is important that this be actual terminal learning objectives if they exist) * Bently key transcal drivers that	Duration (hours)	Price (\$) *	Proficiency Achieved With Activ	Notes 💌	Date Create *	Date Last Revised	Reviewer (SME who co ensure it is current)
5	KYCFM Basic		Know Your Customer's Financial Model	(link to LMS signup page)		 Identity key final-cali drives final drive decision making. «Describe how power companies make money. « Analyze how company impacts financial drivers. « Demonatrate the effect your decisions have on the financial results of your company and your customer. • Rustrate how to sell profits and value rather than products or services. 	12	500		Designed for sales people and those who have some sales responsibilities	1/1/2006	12/1/2015	John Smith
7 0													
9						-							
10													

Search

Identify your learning opportunities and assets



Learning curation articles can be found in January's TD Magazine:

https://www.td.org/Publications/Magazines/TD/TD-Archive/2016/01/Cultivating-Valuable-Learning-Environments

https://www.td.org/Publications/Magazines/TD/TD-Archive/2016/01/Diamond-in-the-Rough

A good Learning Curator selects **only the best** items to share with others.

A good Learning Curator has specific criteria for selection based on skill, role, and proficiency required.

Identify your learning opportunities and assets

Put identified items in the template

Learning objectives are key to the mapping process

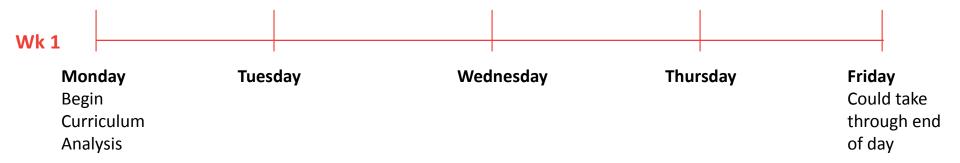
	А	В	С	D	Е		Ν	0	Р
1	Curriculum	n Analysis							
2									
3									
4	Activity Code 💌	Type (e.g., classroom, eLearning, vebinar, job aid, template video, checklist	Training Activity Name/Description	Link To Activity, Asset, or person (regardless of where it is located)	Module Name (only if it is a part of a larger activity)	Learning Objectives (this should not be a description it is important that this be actual terminal learning objectives if they exist)	•	Communicat ion	Financial Analys 🔻
			How My Customer Makes	[link to LMS signup		Identify key financial drivers that drive decision making. Describe how your customers make money. Demonstrate the effect your decisions have on the financial results of your company and your customer. Illustrate how to sell profits and value rather than			
5	HMCMM_001	Classroom	Money	page]		products or services.			X
6	Template_001	Template	Presentation needs analysis template			Use this template to identify the needs and motivation of presentation participants		x	

Resource: Curriculum Analysis Template.xlsx

Categorize for easy mapping

Competency-Based Learning Timeframe

Unless you have no content



Prepare your mapping template

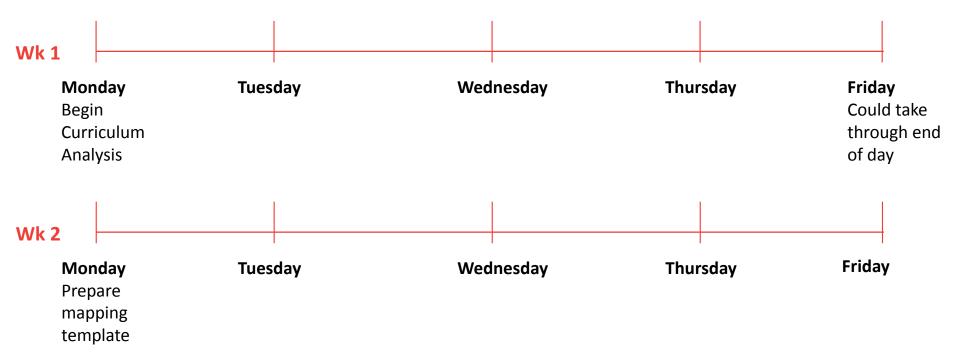
Place a copy of your competency model into the mapping template

4	Job Title 💌	Competency / Task Categon	Skill / Task 🎽	Behavioral Example	Required Proficiency	Activity Code	Туре 💌	Learning Opportunity Name or Description
	Field Services Manager	Communication	presentations	presentations	Applied			
			presentations	Research the role and background of stakeholders before the presentation o Ask probing, open-ended questions about their needs	Applied			
	Field Services Manager	Communication		o Ask "why?" o Talk to peers about stakeholder motivations, needs and requirements Ensure every presentation has a	Applied			
	Field Services Manager	Communication	customer-focused presentations	purpose and delivers value to the recipient(s)				
	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Plan presentations to weave supporting data throughout to support recommendations and timing considerations	Applied			
			Consistently deliver customer-focused presentations	Can prepare a concise, motivating and persuasive presentation o Use clear and concise communication (e.g., bullet points, summaries, etc.)	Applied			
	Field Services Manager	Communication		o Emotional/inspiring visuals that support my message				

Resource: Task To Training Mapping Template.xlsx

Competency-Based Learning Timeframe

Assuming Curriculum Analysis takes 5 days



Map your activities

Map tasks for one competency, one at a time

	А	В		с	D	E			F		N	0
1	Curriculu	m Analysis	;									
2												
											-	
3		Туре						Loor	ing Objectives			
4	Activity Code	(e.g., classro eLearning, we job aid, temp	binar, late Trainin	g Activity escription 🍸	Link To Activity, Asset, or person (regardless of when it is located)	Module Na e (only if it is a p larger activ	art of a	(this should it is importa terminal le	not be a descri nt that this be a arning objectiv they exist)	ption actual res if	-	Communicat I ion J
6	Template_001	Template	Presentation analysis ten					needs and n presentation		the		x
	A	в	С		D	E		F	G			н
1	Mapping Ter	-			-	-			<u> </u>			
	mapping rei	iipiate										
2												
3												
	Job Title	Competency / Task Categon	Skill / Task Consistently deliver customer-focused		vioral Example	Required Proficiency Applied	Activ	vity Code 💌	Туре 🔻			Opportunity Description
		Communication	presentations Consistently deliver customer-focused presentations	Research the stakeholders i	role and background of before the presentation , open-ended questions eds	Applied						
	Field Services				s about stakeholder							
	Field Services	Communication	Consistently deliver customer-focused presentations	Ensure every	eeds and requirements presentation has a delivers value to the	Applied						
	Field Services		Consistently deliver customer-focused presentations	Plan presental supporting dat support recon	tions to weave ta throughout to nmendations and timing	Applied						
	-	Communication	Consistently deliver customer-focused presentations	and persuasiv o Use clear an communication summaries, et	a concise, motivating ve presentation nd concise n (e.g., bullet points, c.)	Applied						
	Field Services Manager	Communication		support my me	spiring visuals that essage							

1) Filter both templates by competency/category

2) Using first task and examples, look for activity whose learning objectives match task examples for target proficiency

3) Match found? Add match to mapping template

4) Move to next task in competency

Resource/Tips & Tricks: Competency-Based Learning - Steps To Implement.docx

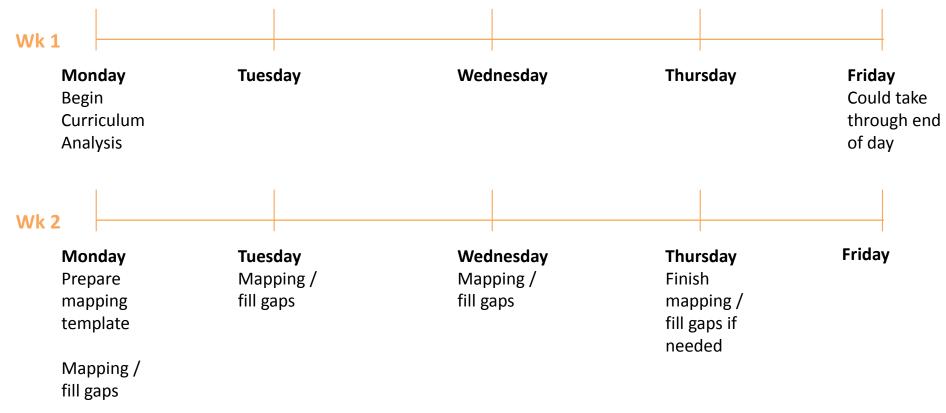
Filling gaps

Propose learning opportunity for any gap with type and learning objective

	А	В	С	D	E	F	G	Н	I
1	Mapping Te	mplate							
2									Highlight any proposed activities in yellow
3									
4	Job Title 💌	Competency / Task Categon	Skill / Task 🍷	Behavioral Examp	Required Proficiency	Activity Code 🍷	Туре 💌	Learning Opportunity Name or Description	Learning Objectives
			Consistently deliver customer-	Use a customer-	Applied				
	Field Services		focused presentations	focused approach to					Use a customer-focused approach to
5	Manager	Communication		presentations Research the role and		SD_CUST_FOCUS	Classroom	Customer Focus course	communications
			Consistently deliver customer-	background of	Applied				
			focused presentations	stakeholders before					
				the presentation					
				o Ask probing, open-					
				ended questions about					
				their needs					
				o Ask "why?"					
				o Talk to peers about					* Identify the needs and motivation of presentation
				stakeholder				Skill practice: Identify the	participants
	Field Services			motivations, needs and				needs and motivation of	* Ensure every presentation has a purpose and
6	Manager	Communication		requirements		SP_001	Skill Practice	presentation participants	delivers value to the recipient(s) * Identify the needs and motivation of presentation
			Consistently deliver customer-	Ensure every presentation has a	Applied			Skill practice: Identify the	participants
	Field Services		focused presentations	presentation has a purpose and delivers				needs and motivation of	* Ensure every presentation has a purpose and
7	Manager	Communication		value to the		SP 001	Skill Practice	presentation participants	delivers value to the recipient(s)
-			Consistently deliver customer-	Plan presentations to	Applied		0.000	presentation participanto	
			focused presentations	weave supporting data					
				throughout to support				Skill practice: Create	
	Field Services			recommendations and				presentation requiring	Weave supporting data throughout a presentation to
8	Manager	Communication		timing considerations		SP_002	Skill Practice	supporting data	support recommendations and timing considerations

Competency-Based Learning Timeframe

Assuming Curriculum Analysis takes 5 days & mapping takes 3 days



Competency-Based Learning Deliverables



The competency model for each role defines the skills required to accomplish their part of corporate strategy

You know what learning opportunities (built or proposed) someone with a skill gap can leverage to close that gap



Competency Assessment Tool

Category	Task/Skill		Limited Awareness	General Awareness	Applied Knowledge	Skilled 🗾	Expert 🚺
Aligning To Customers	Build trust through a customer-focused approach and advocacy	i	\bigcirc	0	۲	0	0
Building A Business Case	Identify clearly the business and financial benefits of a solution in a way that speaks to business impact	ł			۲		
Communicating Effectively	Demonstrate well prepared verbal and written communication and presentation techniques	ż				۲	
Communicating Effectively	Demonstrate timely responses to all inquiries for information within the requested amount of time	ł				۲	
Creating And Closing Opportunities	Research and target prospects	ŧ			۲		
Creating And Closing Opportunities	Conduct interest-building calls (cold calls) when applicable	ł		۲			
Creating And Closing Opportunities	Identify sales leads	ŧ					۲
Creating And Closing Opportunities	Follow up/manages sales leads	ł				۲	0

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Personalized Learning Plan

	nent Results:								
	nent Results:								
oro vou con		Personalized Le	earning Plan					(i) Help	Tutorial
lere you can	see the automatically g	generated recommendatio	ns that can close your s	kill gaps. Printing or exp	oorting the list	will display additional	information.		
	ll gaps to close first. Fil	ter by each selected gap, t	hen select an activity by	/ placing a check in the (On Developme	nt Plan column. When	all activities have	e been selecte	d, click
ubmit.									
	ia ssment Date: 1/19/2016 sment Date: 1/19/2016								
anager Asses	sment Date: 1/19/2016			_					_
Submit	Cancel	Evaluation Deta	il Refresh Activitie	es			C		×
			On Development 🔺	Target Completion	-		Activity Link €	Status 🎈	
Priority	Task/Skill	♦ Activity Description ♦	Plan?	Date	Completed?	Activity Type	Activity Link	Status 🔍	
				Dute				Status	HIS
2	Qualify opportunities	Spend an hour listening to Inside Sales make calls				Activity		Active	
2		listening to Inside Sales make calls Opportunity Sales							
2		listening to Inside Sales make calls					view		1
	opportunities Qualify opportunities	listening to Inside Sales make calls Opportunity Sales Planning (eLearning): Opportunity			-	Activity		Active	
	opportunities Qualify	listening to Inside Sales make calls Opportunity Sales Planning (eLearning): Opportunity Analysis			-	Activity		Active	
2	opportunities Qualify opportunities Qualify	Iistening to Inside Sales make callsOpportunity Sales Planning (eLearning): Opportunity AnalysisOpportunity Sales Planning (ILT): Opportunity		03/31/16		Activity eLearning	view	Active	1

Keeping your mapping current



The skills and behaviors in your model will change

- Usually updated annually or due to major changes
- Mapping can be reviewed via pre-work with 4-6 high performers and recommended updates consolidated during 1-2 hour meeting

Learning opportunities are updated

- Changes to learning opportunities should now be driven by the competencies themselves, so the mapping should be updated before the learning opportunities
- If you don't own an opportunity being modified, verify learning objectives still link
- If curating learning, curation and mapping occur simultaneously



Summary

- You can't accelerate learning transfer unless you have relevance and employee buy-in
 - Starts with competency model
 - Ends with competency-based learning
- If you have learning opportunities that are not tied to your competency model, they are wasting your time and valuable resources
- The most important thing you can do is to ensure that your audience has the skills they need to execute their part of corporate strategy – "competency-based learning"
- You learned how to link competency models to existing learning opportunities, how to identify curriculum gaps, and how to keep your mapping current



Contact Information



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Link to download notes & templates: http://ow.ly/Xq4YL

Link to Competency Models For Professional Development LinkedIn Group for questions: <u>https://www.linkedin.com/groups/8467576</u>

PERSONALIZED LEARNING