

Create informal, competency-based learning... in only 1 day!

Presented By: Cheryl Lasse



Other Webcasts you may want to watch based on questions

- ⚙ How to Build a Competency Model in Record Time
<http://webcasts.td.org/webinar/2235>
- ⚙ How to Accelerate Learning Transfer Through Competency-Based Learning
<http://webcasts.td.org/webinar/1791>
- ⚙ How to Use Standard Competency Models to Accelerate Learning Transfer
<http://webcasts.td.org/webinar/1809>

Other Articles you may want to read based on questions

- ⚙ [Why employees taking charge of their learning is good for you \(millennials\)](#)
– Including how to sell it internally!
- ⚙ [How can my company use competency models](#)
- ⚙ [Using competency models for mentoring](#)
- ⚙ [Using competency models for coaching](#)
- ⚙ [3 Traits that will make you a Learning & Development rock star in 2020](#)

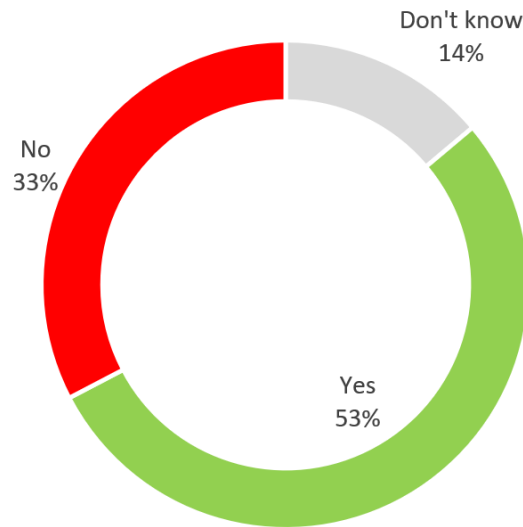
Webcast Objectives



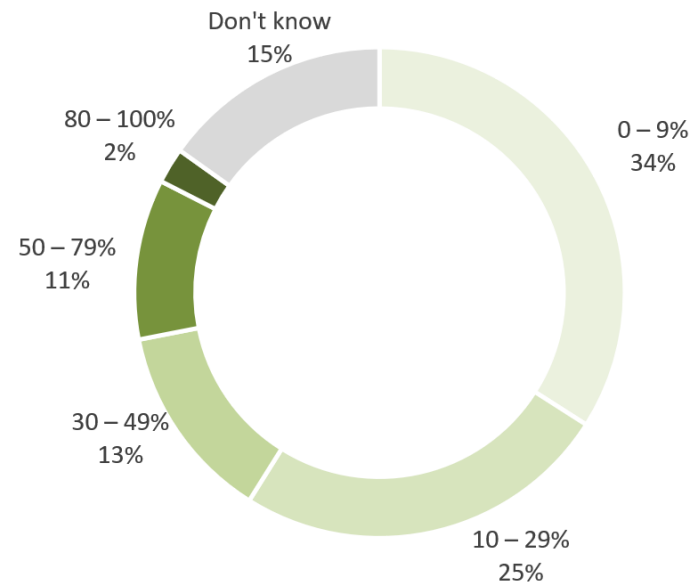
- ⚙ How to ensure you are creating competency-based learning Skill Practices
- ⚙ Step-by-step guidance on how to create a Skill Practice in a day
- ⚙ How to communicate Skill Practice availability and operationalize their use

Webcast Participant Input

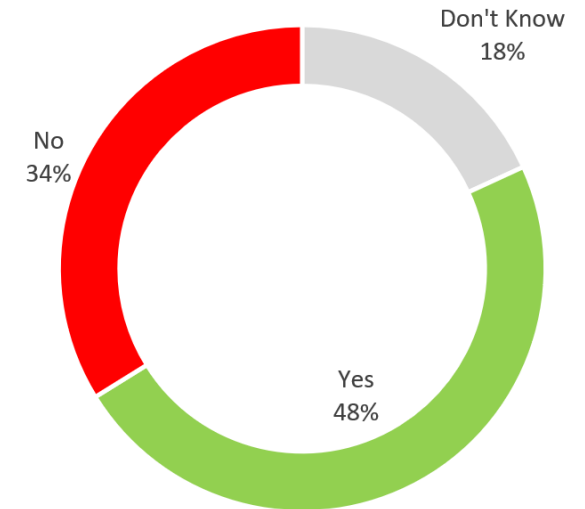
Do you use informal learning today?



What percentage of activities your Learning Department creates is represented by informal learning?

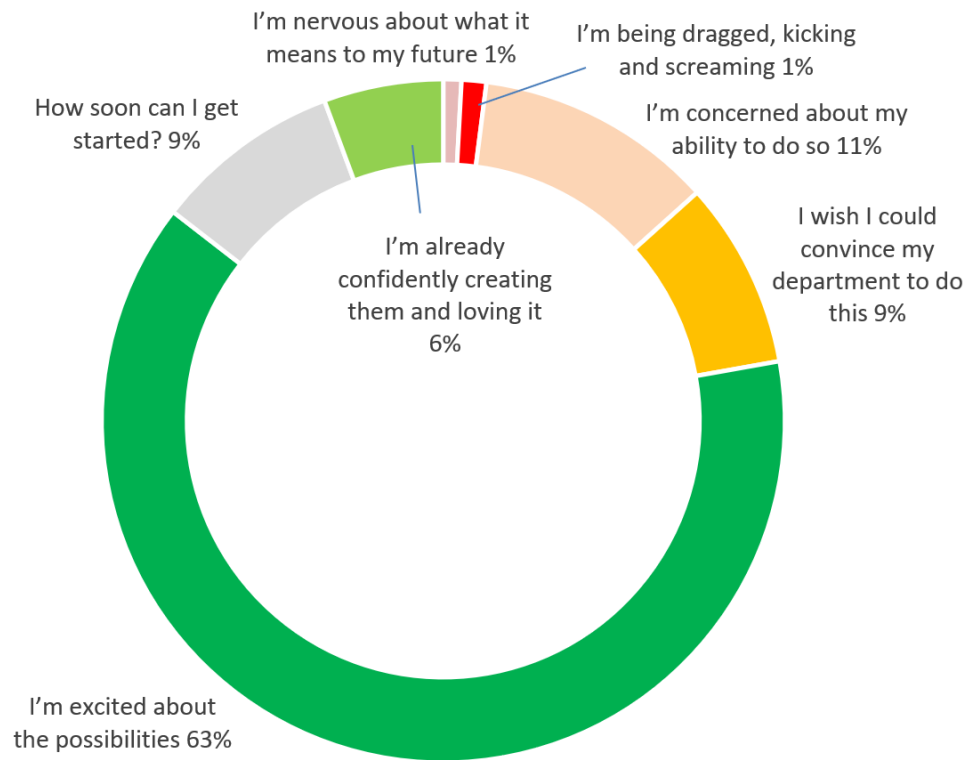


Do you use competency models to drive professional development?

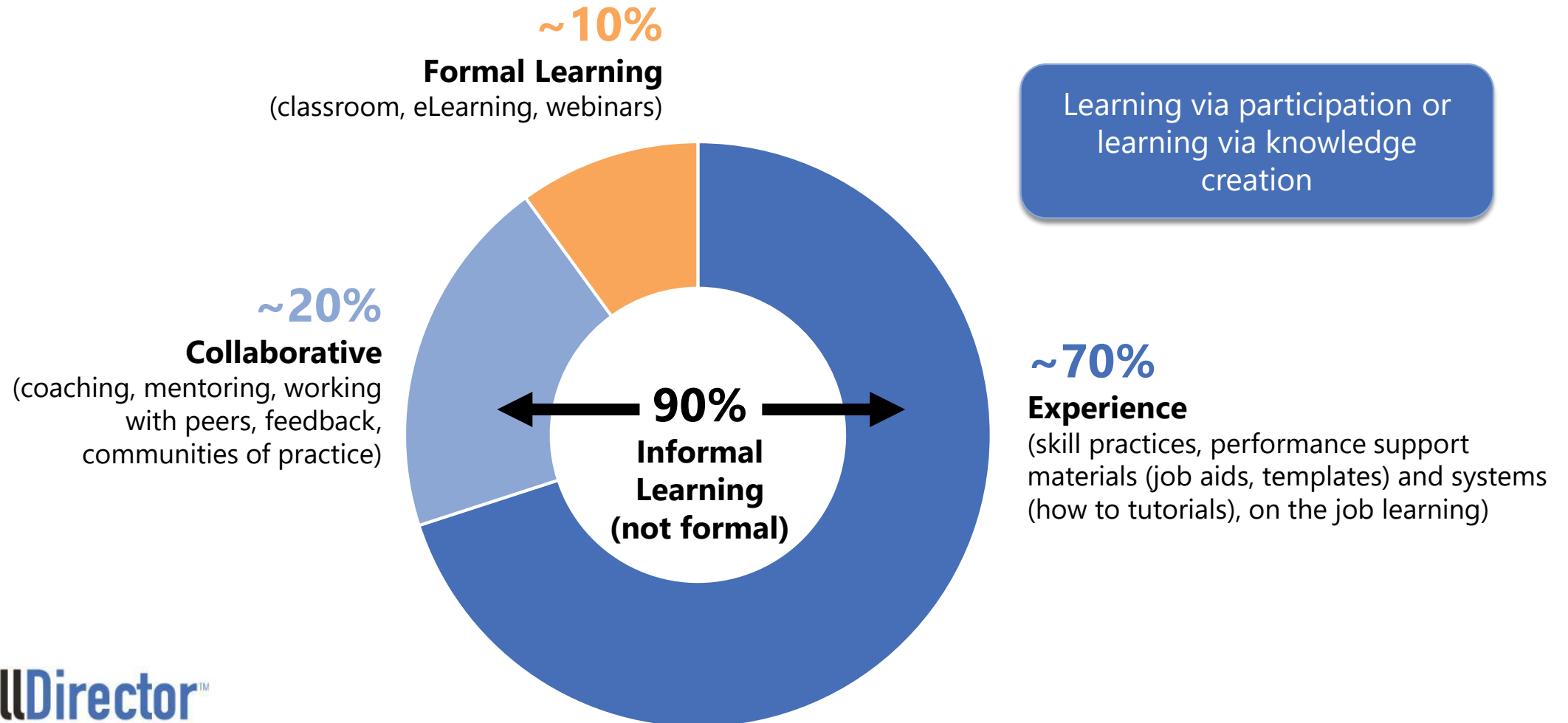


Webcast Participant Input

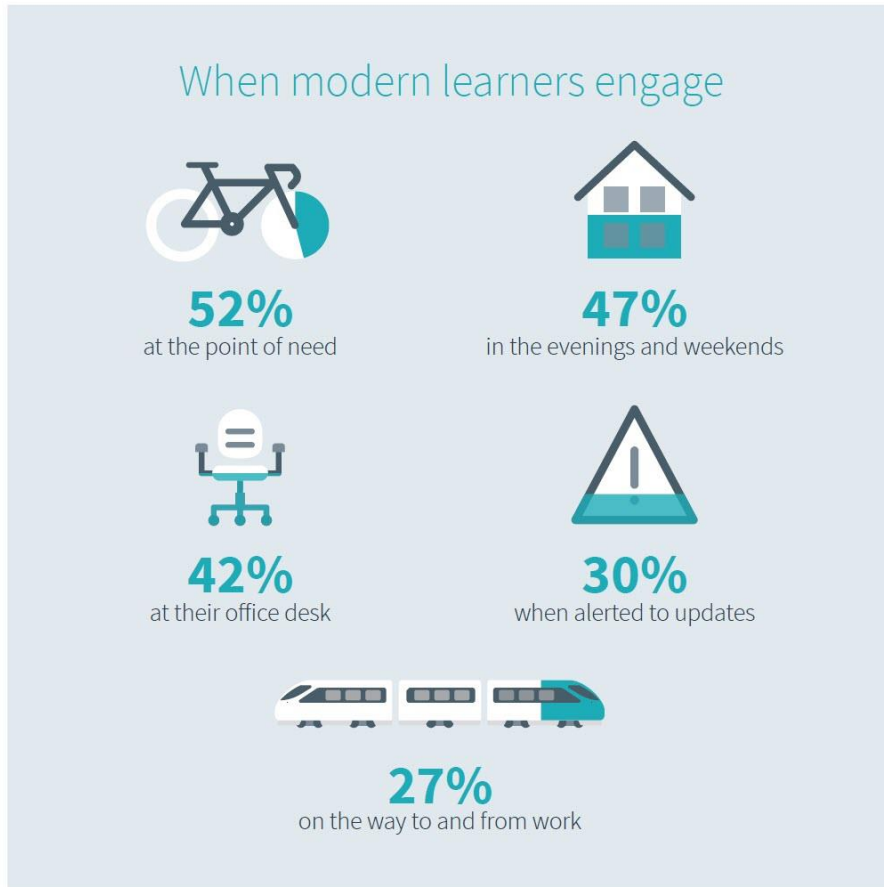
What best describes your feeling about creating informal learning activities?



What is informal learning?



Why Workflow Learning?



2nd biggest challenge for L&D
is getting employees to make time
for learning & development

2017 Workplace Learning Report, LinkedIn

Why Workflow Learning?

Modern learners engage differently,
Yet skill practices
and workflow learning
didn't make the list

What type of learning tools do you/your team use to train employees?



2017 Workplace Learning Report, LinkedIn

Why Workflow Learning?

A modern learning experience focuses on creating real behavior change

*"Most behaviors in the workplace are habits. The biggest mistake learning professionals make is thinking that **talking about a behavior** is the same thing as **doing the behavior**. It's not, which is why many learning events are ineffective in the long run.*

We all have habits on how we communicate, use technology, and even how we manage others, so it's imperative that learning professionals get crisp on what the habit is that you want to instill in your learners."

Why Workflow Learning?

Transformative learning

Transformative learning is the expansion of consciousness through the transformation of worldview and capacities of the self. It's an act of changing how we see and do things.

According to researchers, the three dimensions of transformative learning are:



Psychological

Change in understanding

Knowledge, information, models, and theories shift the learner's understanding and provide the "why."



Behavioral

Change in actions

The learner uses observation, application, and experimentation to do something differently.



Convictional

Revision of belief system

The learner permanently shifts a perspective or view, often through "Aha!" moments or insights.

A skill practice drives transformative learning by not just driving the Behavioral dimension, but also the Psychological and the Convictional dimensions

Selling informal learning to leadership

Would you prefer we develop learning that we can...

- **build quickly,**
- **maintain easily,**
- **costs less,**
- **doesn't take people away from their jobs,**
- **and enables them to execute what you need them to do by building the right habits... which, by the way, is the exact way people want to learn?**

Or would you like us to build more formal learning?



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



Which Skill Practices To Create? Use Competency-Based Learning

Consistently deliver customer-focused presentations

Level	Examples
3 - Applied	<ul style="list-style-type: none">• Use a customer-focused approach to presentations – ensure every presentation has a purpose and delivers value• Analyze the interests or requirements of the audience before the presentation and share only relevant information<ul style="list-style-type: none">○ Talk to peers about stakeholder motivations, needs and requirements○ Understand how the audience prefers to receive information• Plan presentations to weave supporting data throughout to support recommendations and timing considerations• Can prepare a concise, motivating and persuasive presentation<ul style="list-style-type: none">○ Use clear and concise communication (e.g., bullet points, summaries, etc.)○ Emotional/inspiring visuals that support my message• Use active listening techniques

What You Need / 3 Types of Skill Practices



Subject Matter Expert

- ✳ Identify all the steps they perform to do that task/skill
- ✳ Get an example



3-Box



Detailed with
instructions



Detailed with
instructions & examples

3-Box Skill Practice



Example Skill Practice

Document Name: Example Skill Practice - 3 box v1.docx Page 1 of 1

Learning Objective

- Lead the Projects Review meeting

Instructions

- Ask your manager to identify a task-based mentor/subject matter expert for you.
- Shadow the mentor through the process of preparing and sending files before a Review meeting.
- Have them explain to you questions they identified about the data, and how they found them.
- Observe the Review meeting.
- Throughout the process, create your own step-by-step action list, including best practices.
- Review and update the list with your mentor.
- Review your action list with your manager and identify when you can practice what you've learned.

List the questions they found in the data provided and how they found them

--

Step-by-step action list for preparing for and leading the meeting, including best practices


--

Next steps to practice what I've learned

--

Found in the materials you can download.

More Detailed Skill Practice With Instructions

**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.

Found in the materials you can download.

Most Detailed Skill Practice With Instructions & Examples



Personal Operational Excellence Skill Practice Customer-Focused Group Presentations

Document Name: Personal OpEx Skill Practice Group Presentations v4.docx
Page 1 of 15

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Step 8: Plan Your Outline

Now that you have a “what’s in it for me” defined for each of the key stakeholders, layout the key points in the beginning, middle, and summary. You can also identify which stakeholders care about which points, so you can reinforce a nod to them as you present.

In addition, you need to assign the responsibility for each section to each team member who is presenting. While the presentation leader should start and end the presentation, within the beginning and summary, other team members may participate.

Identify a draft timeline to each part, being sure to add contingency time that includes time for questions. For example, if you have 1 hour to deliver your presentation, plan for no more than 40 minutes of content.

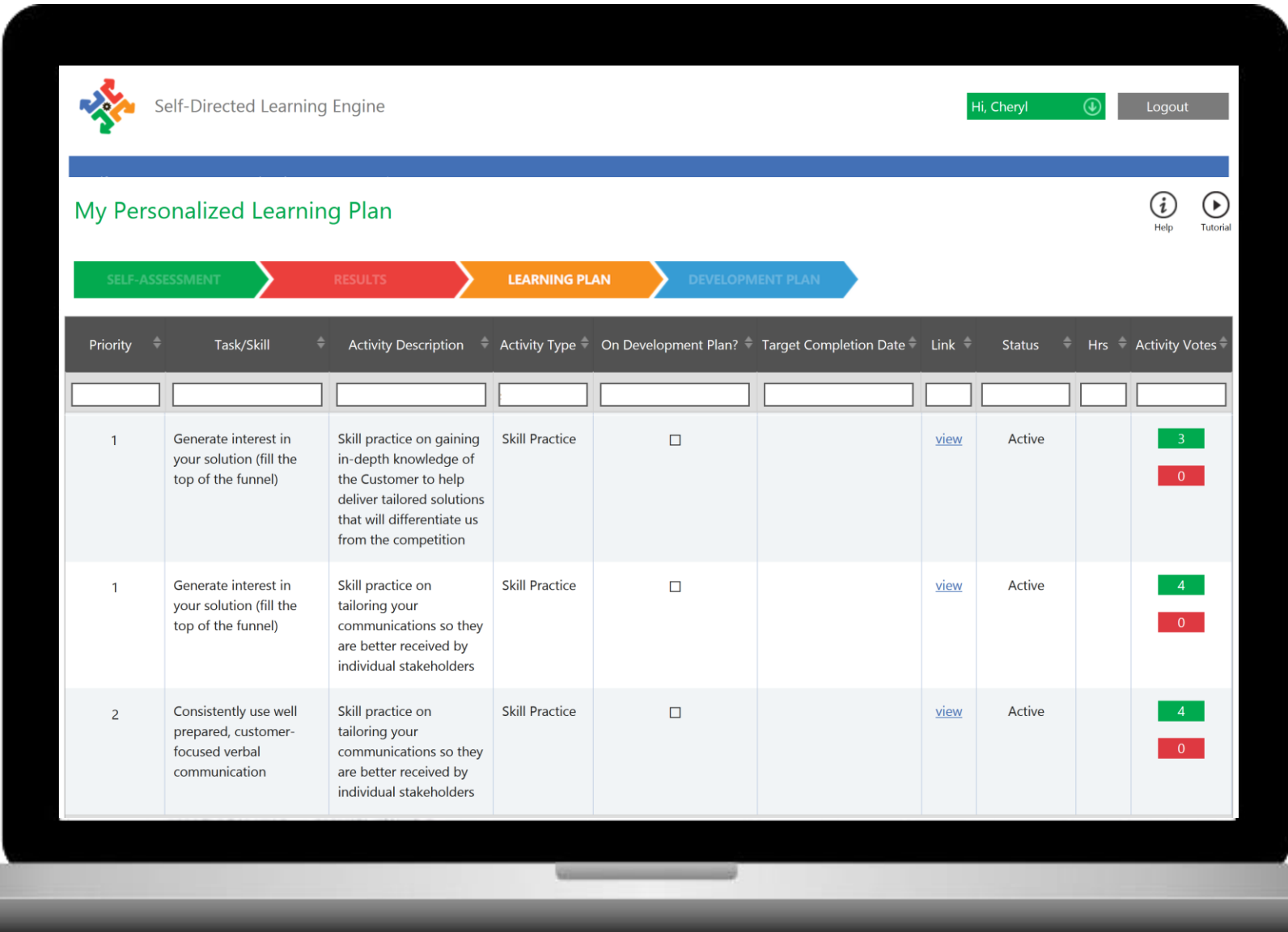
Here's an internal team presentation example:

Beginning	Responsible Party	Timing
Automate parts of the change management process that will: <ul style="list-style-type: none">Streamline existing operations (Ron)Make them more secure (Ron)Reinforce segregation of duties (Ron)	Jacqueline Gagnon	5 min
Middle	Responsible Party	
<ul style="list-style-type: none">Layout the changes in a very straightforward way – describe each of the 3 stepsCostTimeline	Changes: Robert Gomez Cost: Sue Zhu Timeline: Arun Affan	25 min
Summary	Responsible Party	
Steps to move forward <ul style="list-style-type: none">ApprovalFundingImplementation team	Jacqueline Gagnon	10 min

Most Detailed Skill Practice With Instructions & Examples

Strategic Communication Plan Create a strategic communication plan for a customer	Task List Use a structured process to differentiate, prioritize, and complete high value tasks	Build a Business Case Using the provided templates, follow the step by step process to build a business case	Effective Email Techniques Write effective, customer-focused emails
Project Plan Develop a project plan, with clear responsibilities and deliverables, and enroll and hold key players accountable	Build and Execute a Relationship Strategy Use a Relationship Action Plan to create structure and routine for developing and sustaining mutually beneficial relationships with the people who can help you the most	Build Chemistry With Others Identify specifically how you will communicate with those with whom you work to optimally build chemistry	Customer-Focused Presentations Prepare and deliver customer-focused presentations that address the needs and motivation of the audience
Account/Territory Plan Create an account or territory plan for how you will achieve your goals, and prioritize the opportunities and accounts to pursue	Influence Others Use a structured process to help you persuade, negotiate, and compromise with internal and external stakeholders	Active Listening Use active listening and discovery skills to understand “real” issues/needs and build chemistry, and the importance of verifying the conversation in writing	Develop Insight Use trend information to develop, apply, and deliver insight (“teachable moments”)
Drive Constructive Tension And Change Use a structured process to create a constructive tension that drives collaborative dialogue, faster decisions, and desired results	Create Buyer Alignment Align your sales process to the customer’s buying process and determine if you can win	Negotiation Planning Use a structured process for planning negotiations, include your pricing and negotiables strategy, as well as your timing	Follow Through On Commitments Use a structured process to ensure you drive action and follow through on commitments

Communicate Availability / Operationalize Their Use



The screenshot displays the 'Self-Directed Learning Engine' interface. At the top, a user is logged in as 'Hi, Cheryl' with a 'Logout' button. Below the header, the title 'My Personalized Learning Plan' is shown, accompanied by 'Help' and 'Tutorial' icons. A progress bar indicates the current stage: 'SELF-ASSESSMENT' (green), 'RESULTS' (red), 'LEARNING PLAN' (orange), and 'DEVELOPMENT PLAN' (blue). The main content is a table with columns for Priority, Task/Skill, Activity Description, Activity Type, On Development Plan?, Target Completion Date, Link, Status, Hrs, and Activity Votes. The table lists three activities, all marked as 'Active' and 'On Development Plan?'. Each activity has a green vote button (3, 4, and 4 votes respectively) and a red vote button (0 votes each).

Priority	Task/Skill	Activity Description	Activity Type	On Development Plan?	Target Completion Date	Link	Status	Hrs	Activity Votes
1	Generate interest in your solution (fill the top of the funnel)	Skill practice on gaining in-depth knowledge of the Customer to help deliver tailored solutions that will differentiate us from the competition	Skill Practice	<input type="checkbox"/>		view	Active		<div>3</div> <div>0</div>
1	Generate interest in your solution (fill the top of the funnel)	Skill practice on tailoring your communications so they are better received by individual stakeholders	Skill Practice	<input type="checkbox"/>		view	Active		<div>4</div> <div>0</div>
2	Consistently use well prepared, customer-focused verbal communication	Skill practice on tailoring your communications so they are better received by individual stakeholders	Skill Practice	<input type="checkbox"/>		view	Active		<div>4</div> <div>0</div>

Communicate Availability / Operationalize Their Use

Actively solicit feedback for continuous improvement

TEMPLATE

Attendee: John Smith, VP of Sales

Homework:

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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.

[Click here](#) if you have ideas for improving this skill practice. We'd love to hear them!

Use automated workflow to keep them current



Sat 2/10/2018 9:48 AM
SDLE@my-sdle.com
SDLE: Training Activities to review/revise
To: classe@skilledirector.com



Self-Directed
Learning Engine™
Skill development made to order.

This is an automated message informing you that the following list of Activities should be reviewed:

Activity Code	Activity Description	Review date
SD_SP_CONT_PLAN	Contingency Planning: Use a structured process to define and plan for both known risks and the unexpected so you can anticipate breakdowns in execution and quickly make changes when required	02/07/2018
SD_SP_VALUE_FOCUS	Customer Satisfaction: Value Focus: For each of several internal or external requests, determine how you will meet them in a customer-focused way that delivers value	02/08/2018
SD_CUSTOMER_CENTRAL_ILT_03	Customer Central (ILT): Personality Types	01/29/2018
SD_PROBLEM_SOLVING_e_02	Problem Solving & Analysis (e): Improving Decision Quality	01/29/2018

The following list of Activities should be revised:

Activity Code	Activity Description	Revision date
SD_DISC_ONLINE	DISC Overview	02/28/2018

To review/revise the Training Activities, please click the following link:
[Review/Revise](#)

[Click here](#) if you have ideas for improving this skill practice. We'd love to hear them!

Webcast Objectives Achieved



- ⚙ How to ensure you are creating competency-based learning Skill Practices
- ⚙ Step-by-step guidance on how to create a Skill Practice in a day
- ⚙ How to communicate Skill Practice availability and operationalize their use

Contact Information



Cheryl Lasse, Managing Partner

407.876.9850

classe@skilldirector.com

SkillDirector.com



Download materials from this webinar

[Link to ATD Skill Tracker](#)

[Link to Competency Models For Professional Development LinkedIn Group](#)

[Link to white paper: Why employees taking charge of their learning is good for you](#)

[Link to other webinars](#)