



ReThink Learning - Design and Development Playbook



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About Michelle Ockers



Michelle Ockers is a leading contemporary organisational learning practitioner and contributor to the learning community in Australia and New Zealand.

Her extensive experience includes establishing and leading a technical academy at Coca-Cola Amatil and strategic leadership on learning transformation at Qantas. She supports organisations to shift the mindset and skills of L&D teams, modernise learning strategy and build learning culture.

Michelle was recognised by the Australian Institute of Training and Development as their L&D Professional of the Year in 2019 for her contribution to the practice of Learning and Development. She received the 2019 Internet Time Alliance Jay Cross Memorial award for contribution to the practice of informal learning.



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I care a lot, but ultimately you are responsible.

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Introduction

What is Learning?

Learning is about change. Learning can be defined as a positive change in knowledge, skills and attitude.

In the context of organisations there is another important consideration. The purpose of learning in organisations is to bring about a change in behaviour that benefits the organisation and its people. If people complete a

The goal of behaviour change as an outcome of learning shapes the steps and advice contained in this playbook.

Why should you use this playbook?

Learning is critical to continuously improving every aspect of your business. This version of the playbook was created during the period of physical distancing due to COVID-19. In this period classroom training was not viable. Learning and Development teams were designing solutions for use almost solely in virtual learning environments. They were also redesigning existing solutions to convert them from face-to-face delivery to virtual environments. At this point it's time to think differently and build your skills to create effective, engaging learning solutions for virtual environments.

When classroom training becomes a viable option for most organisations again this playbook will be updated to reflect face-to-face environments. Sections 1 (Needs Analysis) and 3 (Solution Development) will endure with little, if any, change. Section 2 (Solution Design) will be updated to reflect face-to-face sessions as an option for learning activities.

What is the playbook for?

This playbook contains clear, practical advice on steps to take and tools to use to create or convert learning solutions for the virtual environment. Now is the time to up your game and create new offerings to not only help your business now, but also emerge stronger when physical distancing eases.

What's in the playbook?

Playbook Element	Description
Core playbook document	Process steps to guide you through designing and developing a learning solution (this document that you are reading right now)
Toolkit	Templates that you can use to document your needs analysis, solution design and development plan
Tools and Technologies spreadsheet	Information to help you select tools to use to develop and deliver your learning solution. Resources to help you get started using tools.
Additional Resources	Resources with supporting information underlying program content and more advanced information for further exploration



How do I use the playbook?

Before starting work on your learning solution, it is strongly recommended that you review this playbook and toolkit to give yourself a feel for the step-by-step process to design and develop your learning solution. The first time you use the playbook, work through each step in the sequence presented.

Each process step includes:

- An introduction which explains the purpose of the step
- To Do steps
- Tips
- Tools and additional resources

All templates have been compiled into a toolkit. You can download and complete the toolkit as printed version or save online and complete electronically. The download link is in the table on the preceding page.

If you already have an equivalent process or template that you use for some steps you may want to compare this with the playbook content and decide which to use for that step. Be aware that later steps in the playbook process draw upon information gathered and decisions taken in earlier steps.

How can I suggest improvements?

Please let us know what you've found useful in the guide and suggested improvements. Was something unclear or unhelpful? Is there something you'd like to see added to the playbook or toolkit?

Please email your feedback to michelle@michelleockers.com



Section 1 – How do I identify and analyse the need?

It can be a lot of fun creating resources and playing with new online tools. Resist the urge to race in! You are about to put the effort (and possibly money) converting or creating programs and resources.

Pause and think about the problem or need you are trying to address. What do people need to be able to do? What will really help them to do it? What will motivate them to actually use whatever you create? How are you going to evaluate your solution to make sure it is hitting the mark?

This section provides steps, each step poses a question and provides tools to help you define the problem or need to be addressed and understanding the people who have this need. Work through each step in the order they are presented. Whether you are redesigning an existing program or developing a new program the process is the same. Do not assume that analysis was done previously or that it is still up to date.



Tips:

Think of the steps in this section as a good investment of time. It will set your solution up for success and ensure that people find it valuable.

Section 1 – Process steps





Step 5 – Why can't they do it now?

You will recall that the purpose of your learning solution is to help people to change behaviour in a way that benefits both the organisation and the people in target audience groups. The insights you gain by creating a persona will help you to figure out why people aren't currently taking the actions needed to achieve this. Make a list of everything that is preventing them from taking these actions. Ask what else is going to prevent them from taking action even when they have the required knowledge and skills. Look beyond knowledge and skills gaps for insight.

Once you have made your list you can categorise every item on your list using the four categories in the table below. This will help you to design an effective solution.

Category	Definition / Description
Knowledge	They don't know (enough) about it. Examples: <ul style="list-style-type: none"> • They don't know enough about the impact of ageing on mobility to modify an exercise program for older people. • They don't know enough about how materials react to a manufacturing process to identify whether the process is under control. • They don't know who has the authority to make different decisions in our organisation. • They don't know who uses the output of their tasks and how the use it.
Skills	They don't know how to do it or need more practice to do it well, or they lack pre-requisite skills. Examples: <ul style="list-style-type: none"> • They need to practice giving performance feedback. • They need to master landing an aircraft in normal conditions before practicing in emergency conditions. • They have never used the computer system being introduced.
Attitude	They don't care (enough) about it or don't think they can do it. What they think and feel will generally indicate whether attitude is an issue. Example: <ul style="list-style-type: none"> • This task or activity is not very important. • I'm not very good at this type of thing. • It's not really my job.
Environment	The systems, processes, tools, technology, how they are managed or something else in their environment doesn't support them to do it (well) Examples: <ul style="list-style-type: none"> • They do not have enough time in their working day to do this task. • The way their performance is evaluated and rewarded actually encourages different actions/behaviours. • The computer system they need to use is slow or not easy to use. • There is no process for them to follow or the process is too hard to follow. • It's too noisy or busy in their environment to do it. • They don't have the equipment necessary to practice this skill. • Their manager doesn't think this is important.



To Do (Toolkit Step 5):

- a. Using the table identify what is currently preventing people from performing the required actions.



Tips:

- Use insights you gained when you created a persona to help you complete this step.
- If you have selected more than one factor identify up to three that have the most impact on limiting performance.

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Step 5 - Why can't they do it now?

- Make a list of what is stopping your target audience from taking the actions you listed at Step 3. Be as specific as you can. e.g. what do they not know, what is it they cannot currently do, what tools or processes are not in place, what is (or will) reduce their motivation to do these actions.
- For each item listed identify whether this is related to a lack of Knowledge (K), Skills (S), Attitude (A) or Environment (E). Sometimes more than one of these categories may apply. For each item on the list pick 1 or 2 of these categories that you feel are most relevant.

What's stopping them taking action(s)?	Limiting Factor			
	K	S	A	E
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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