Welcome to our Webinar

In our first webinar, we talked about subject matter experts (SMEs):

- Why we reach out to them
- What we can expect from them
- Why they need to work with an Instructional Designer to create learning that is:
  - Engaging
  - Effective

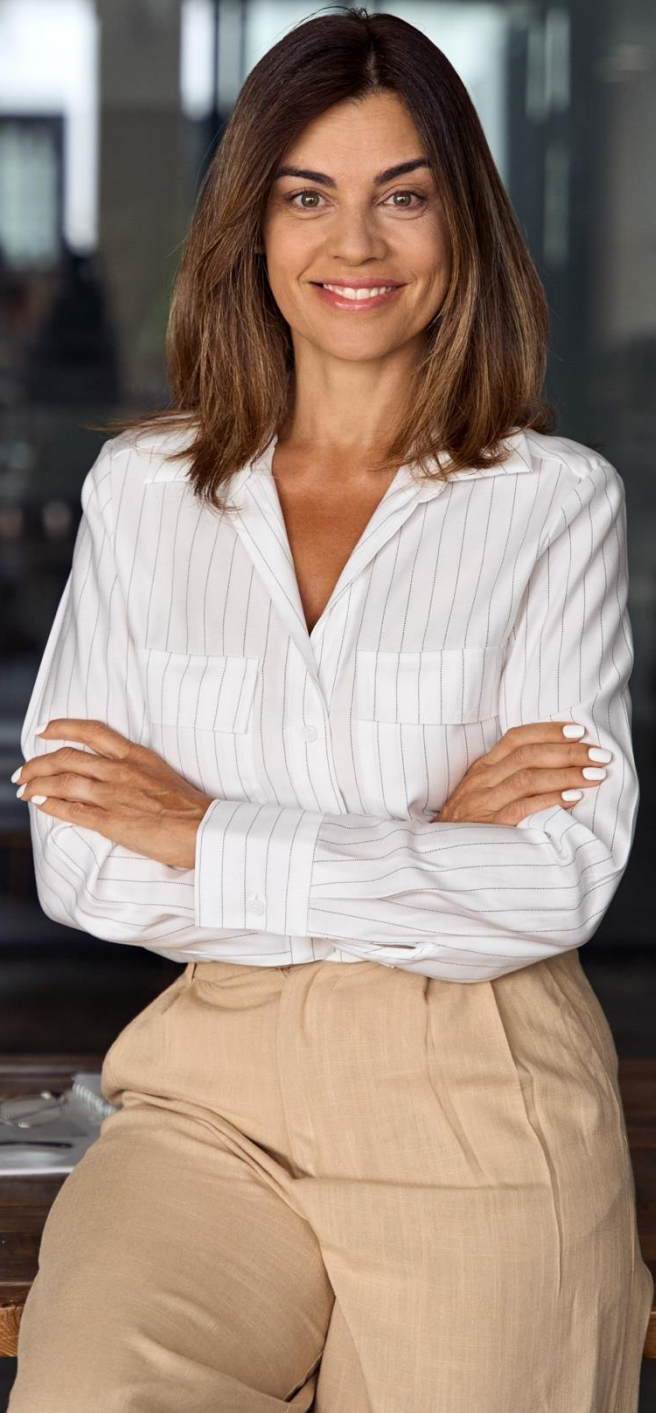We also talked a bit about that relationship.

Remember our SME

A subject matter expert (SME) is a person with deep knowledge and expertise in a specific topic.

Remember our Instructional Designer

An instructional designer (ID) creates learning experiences based on learning science and neurological research.

Today

To support this team in achieving their objectives, you need to understand:

- What they do step-by-step to create learning experiences
- The choices the team needs to make and what drives those choices
- The impact of the wrong choices
- How to set a project up for success

Where is our focus: Learning Experiences vs. Training

The difference is linguistic, but important

When we talk about training, we tend to automatically focus:

- On the content
- What we want to teach
- How we want to teach it

The focus is on us. We do the work; they absorb.

Where is our focus: Learning Experiences vs. Training

When we talk about learning experiences, we naturally focus:

- On the learner
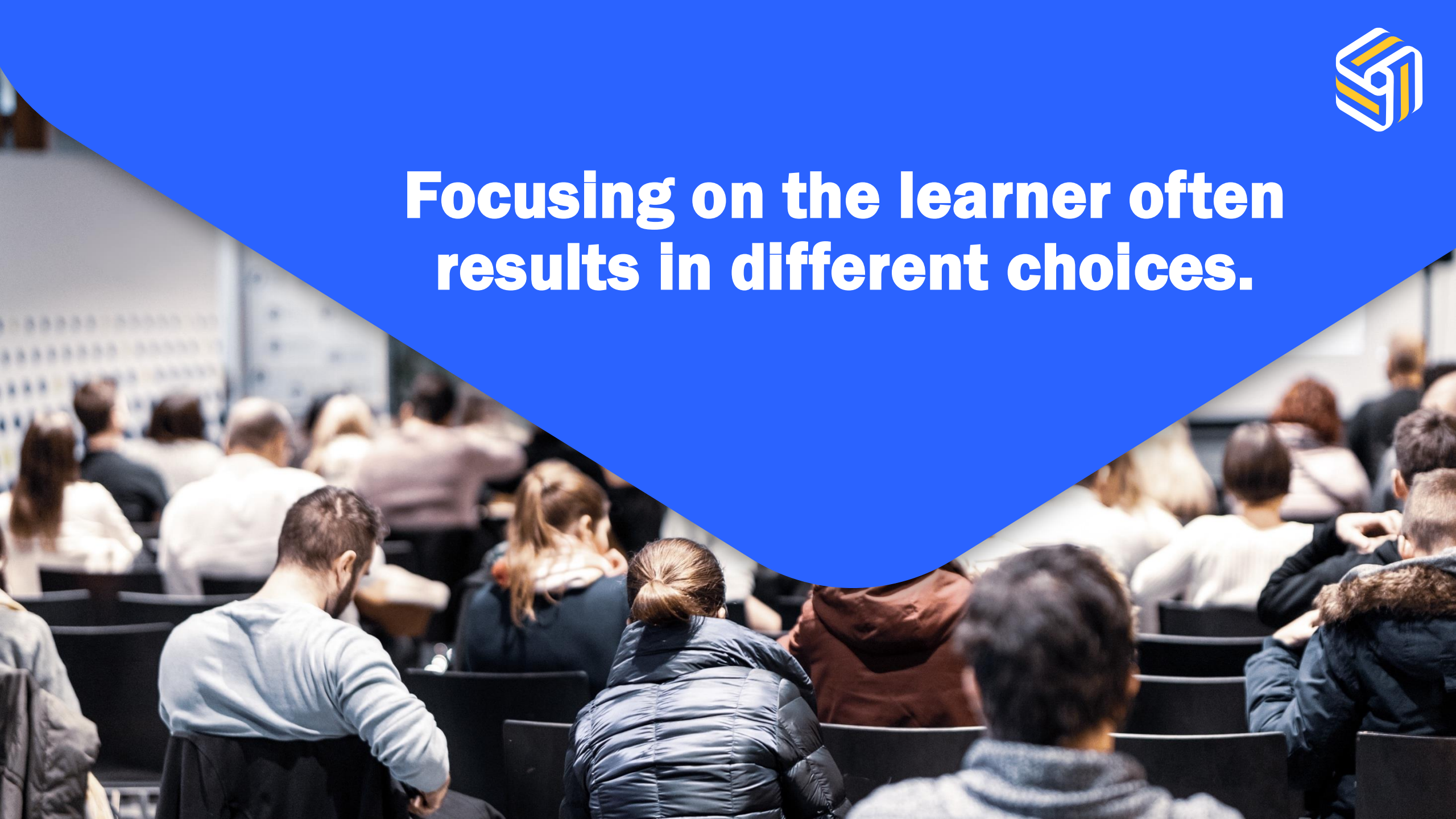- What they need to experience to gain new knowledge, skills, behaviors

The focus is on them. They learn based on what we provide to them.

Focusing on the learner often results in different choices.

Chat

Have you ever produced a workshop to teach a new skill?

What happened?

- How many of the participants were able to apply that new skill the next day?

- How many of them remembered how to do it the next week?

- How many of them still do it habitually?

The Cliff

In most cases, learners quickly fall off a cliff and go back to the old way of doing things.

There are exceptions, but they are rare.

Learning is change, and change does not happen overnight.

The Competency Journey

Changing a behavior (learning and applying a skill) happens in four stages:

"I'm fine thank you"

"What should I be doing?"

"I'm sure I can do that"

"I'm fine thank you"

The Competency Journey

Changing a behavior (learning and applying a skill) happens in four stages:

Unconsciously Incompetent

"I'm fine thank you"

Consciously Incompetent

"What should I be doing?"

Consciously Competent

"I'm sure I can do that"

Unconsciously Competent

"I'm fine thank you"

The Competency Journey (4 Stages of Learning)

Do you think the same type of learning experience works for each step?

How do you think it changes?

The Competency Journey – Our role

This is all about communication – "There is a better way, did you know that?"

Unconsciously Incompetent

"I'm fine thank you"

Consciously Incompetent

"What should I be doing?"

Consciously Competent

"I'm sure I can do that"

Unconsciously Competent

"I'm fine thank you"

The Competency Journey – Our role

Initial learning starts here, once people are open to doing something different.

These are the basics. The emphasis is on the what and the how.

Unconsciously Incompetent

"I'm fine thank you"

Consciously Incompetent

"What should I be doing?"

Consciously Competent

"I'm sure I can do that"

Unconsciously Competent

"I'm fine thank you"

The Competency Journey – Our role

Here the focus is on turning understanding into activity and applying the new knowledge/skill/action.

Unconsciously Incompetent

"I'm fine thank you"

Consciously Incompetent

"What should I be doing?"

Consciously Competent

"I'm sure I can do that"

Unconsciously Competent

"I'm fine thank you"

The Competency Journey – Our role

Getting here takes repeated practice — coaching helps!

Unconsciously Incompetent

"I'm fine thank you"

Consciously Incompetent

"What should I be doing?"

Consciously Competent

"I'm sure I can do that"

Unconsciously Competent

"I'm fine thank you"

Before choosing a direction...

There's a lot to think about.

This is where some learning projects get into trouble.

They make decisions and even start creating learning experiences before they've thought it through.

The First Question: What Do You Want to Accomplish?

You need to know if:

- You want them to be able to apply new skills?

- Or just remember or understand them?

Why?

These outcomes require different types of learning experiences!

The Learning Creation Process

The learning creation process forces your subject matter expert and instructional designer to think things through.

We use a four-step process.

| High Level Design | Innovation & Creativity | Detailed Design | Development |

Let's talk about:

- What happens at each step & what happens if you skip a step (it's tempting to do so)

Step 1: High Level Design

Business Purpose:

- What is the business goal of this learning?

- How does it help the company and its employees achieve strategic goals?

- If you can't answer this, why are you doing this?

High Level Design → Innovation & Creativity → Detailed Design → Development

Step 1: High Level Design

Now let's focus on the learner.

- Where **they** are now? (the situation)

- Where do we want **them** to go? (learning objectives and outcome)

- How we are going to get them there? (the steps — learning experiences)
  - Each learning experience has its own learning objectives and outcomes

High Level Design → **Innovation & Creativity** → **Detailed Design** → **Development**

If You Set the Wrong Objectives...

Your outcomes won't achieve your goals!
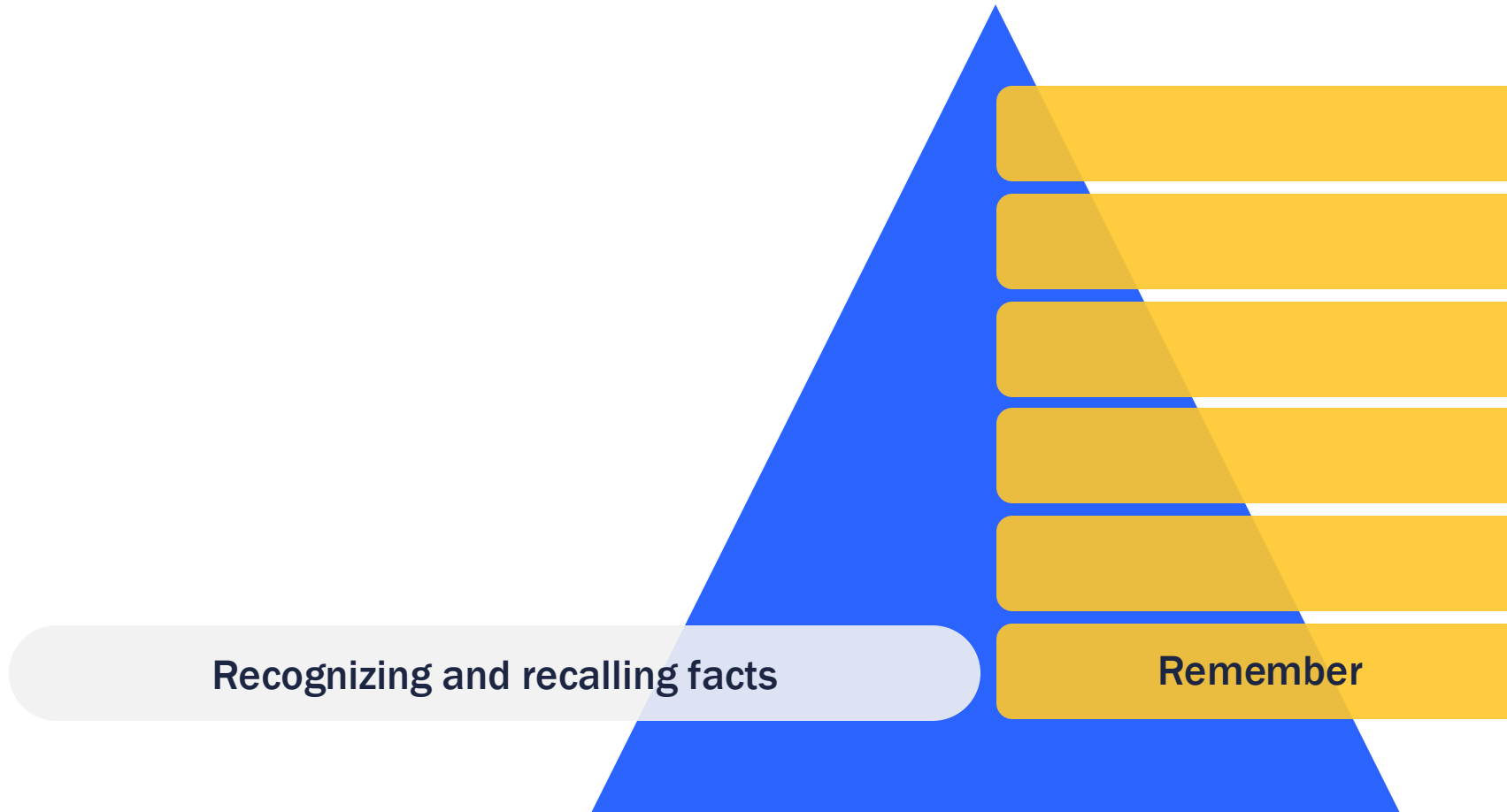
How could they? If you don't choose the right target, you can't set right course!
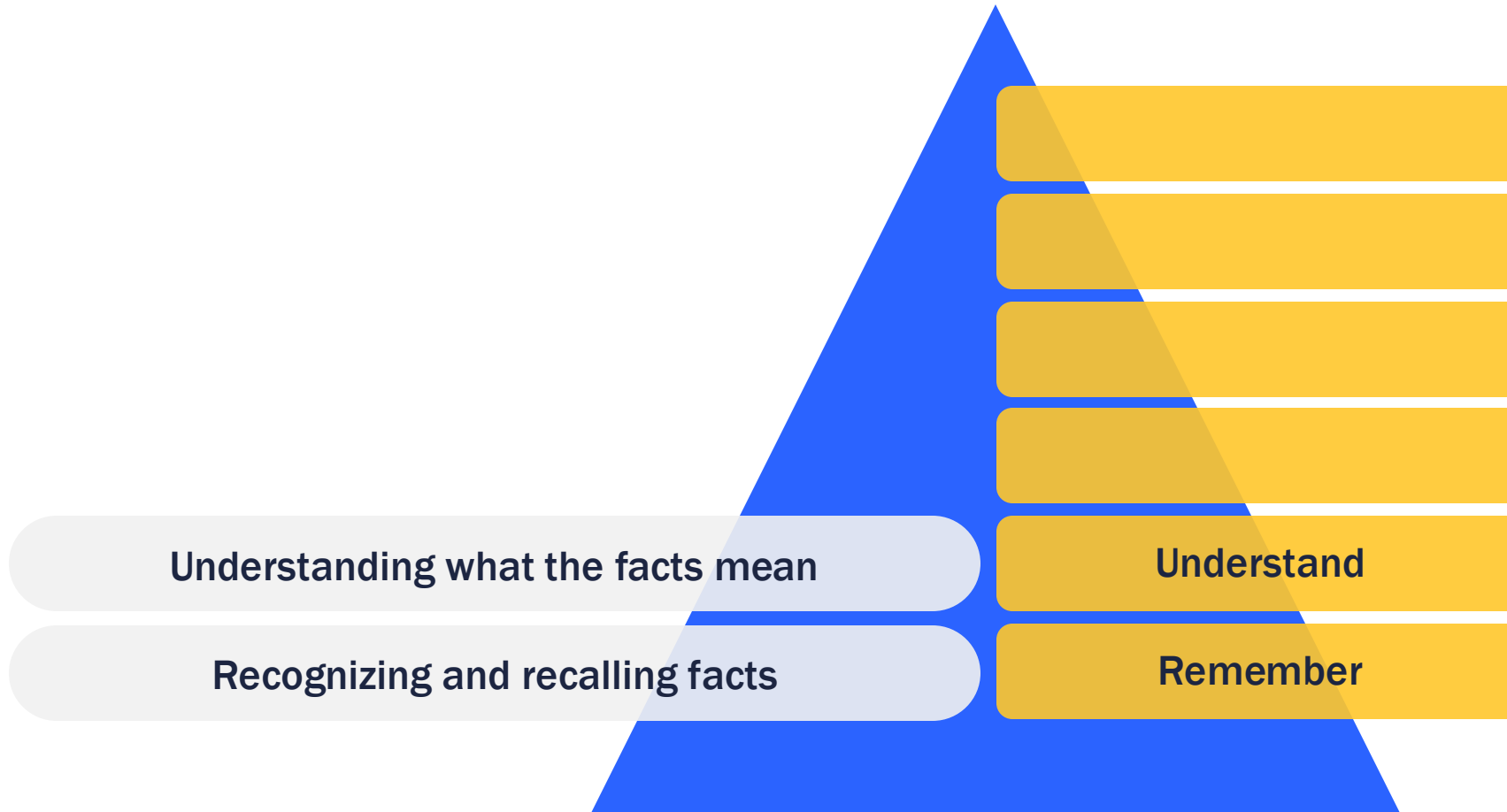
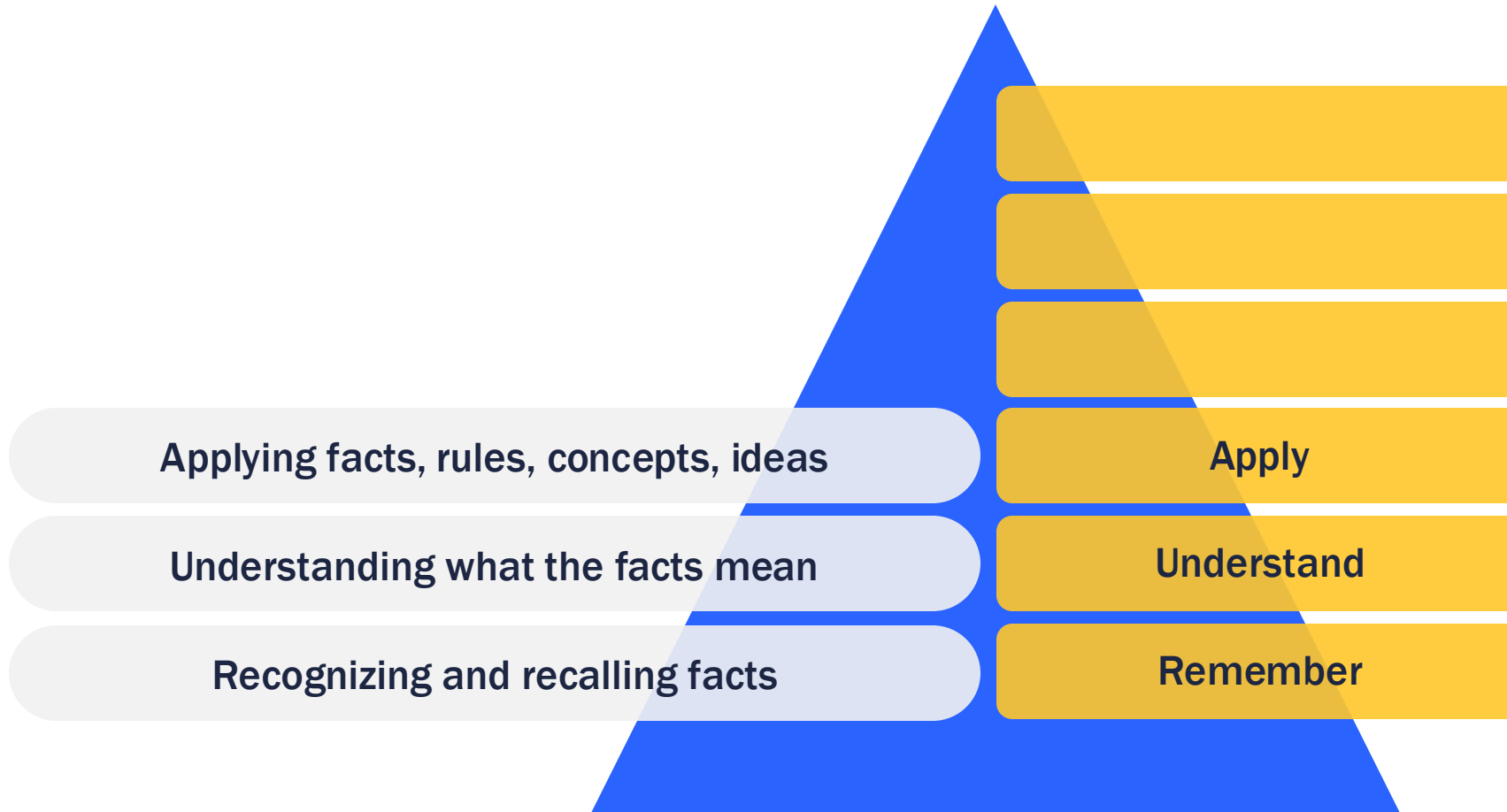(This happens a lot.)

Learning Objectives: Bloom's Taxonomy

Recognizing and recalling facts

Remember

Learning Objectives: Bloom's Taxonomy

Understanding what the facts mean — **Understand**

Recognizing and recalling facts — **Remember**

Learning Objectives: Bloom's Taxonomy

Applying facts, rules, concepts, ideas — Apply

Understanding what the facts mean — Understand

Recognizing and recalling facts — Remember

Learning Objectives: Bloom's Taxonomy

Breaking down information into component parts	**Analyze**
Applying facts, rules, concepts, ideas	**Apply**
Understanding what the facts mean	**Understand**
Recognizing and recalling facts	**Remember**

Learning Objectives: Bloom's Taxonomy

Judging the value of information or ideas	Evaluate
Breaking down information into component parts	Analyze
Applying facts, rules, concepts, ideas	Apply
Understanding what the facts mean	Understand
Recognizing and recalling facts	Remember

Learning Objectives: Bloom's Taxonomy

Combining parts to make a new whole	Create
Judging the value of information or ideas	Evaluate
Breaking down information into component parts	Analyze
Applying facts, rules, concepts, ideas	Apply
Understanding what the facts mean	Understand
Recognizing and recalling facts	Remember

Learning Objectives: Bloom's Taxonomy

Description	Level
Combining parts to make a new whole	Create
Judging the value of information or ideas	Evaluate
Breaking down information into component parts	Analyze
Applying facts, rules, concepts, ideas	Apply
Understanding what the facts mean	Understand
Recognizing and recalling facts	Remember

Initial Learning

Learning Objectives: Bloom's Taxonomy

Combining parts to make a new whole	Create	
Judging the value of information or ideas	Evaluate	
Breaking down information into component parts	Analyze	
Applying facts, rules, concepts, ideas	Apply	Practice
Understanding what the facts mean	Understand	
Recognizing and recalling facts	Remember	Initial Learning

Document Your Thinking

Create an HLD document that describes the big picture:

- The business rationale and purpose

- The Objectives and Outcomes

- The Learner's experience
  - What will they feel as a result

- Key Takeaways

- Often, a suggested learning approach:
  - Digital or self-paced learning? (great for scalable initial learning)
  - Workshop? (great for in-person practice)
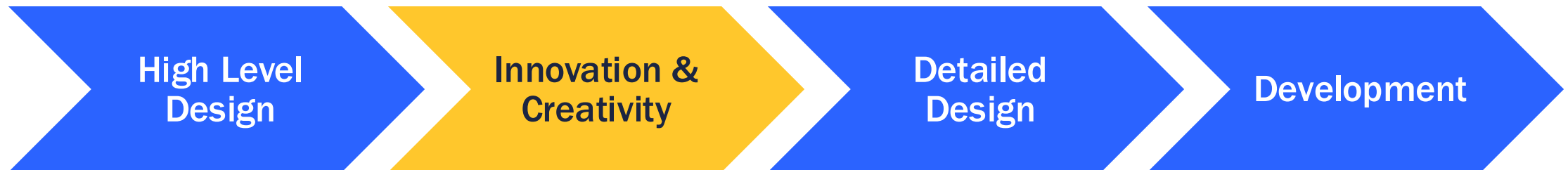 - Coaching? (great to make new skills a habit)

Step 2: Innovation & Creativity

People don't learn unless they engage.

Here we ask:

- How can we make this engaging?

- People engage when:
  - It matters to them
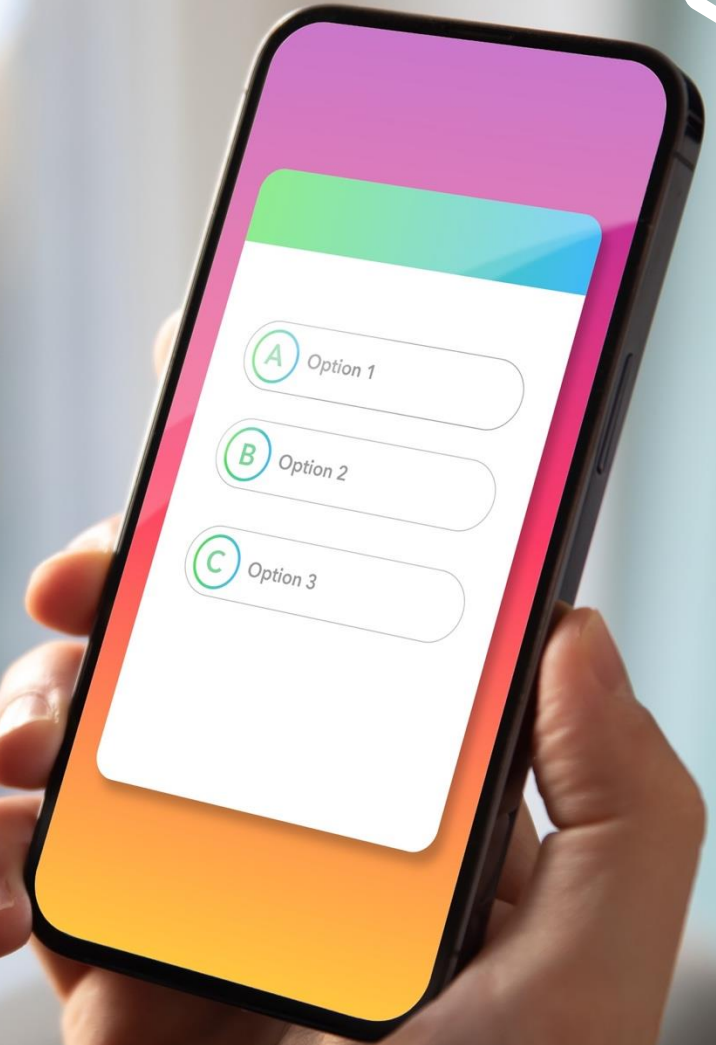 - When they feel challenged
  - When the experience is enjoyable

High Level Design → Innovation & Creativity → Detailed Design → Development

Poll

Which words reflect your belief as to what e-learning is:

- Tell & Test

- Boring

- Useful for compliance content

- Engaging

- Fun

- Cheap

- 'Click Next to continue'

Step 2: Innovation & Creativity

Creative Digital and Self-Paced Learning

We think digital learning has gotten a bad rap.

It's can be so much more than 'Tell & Test'.

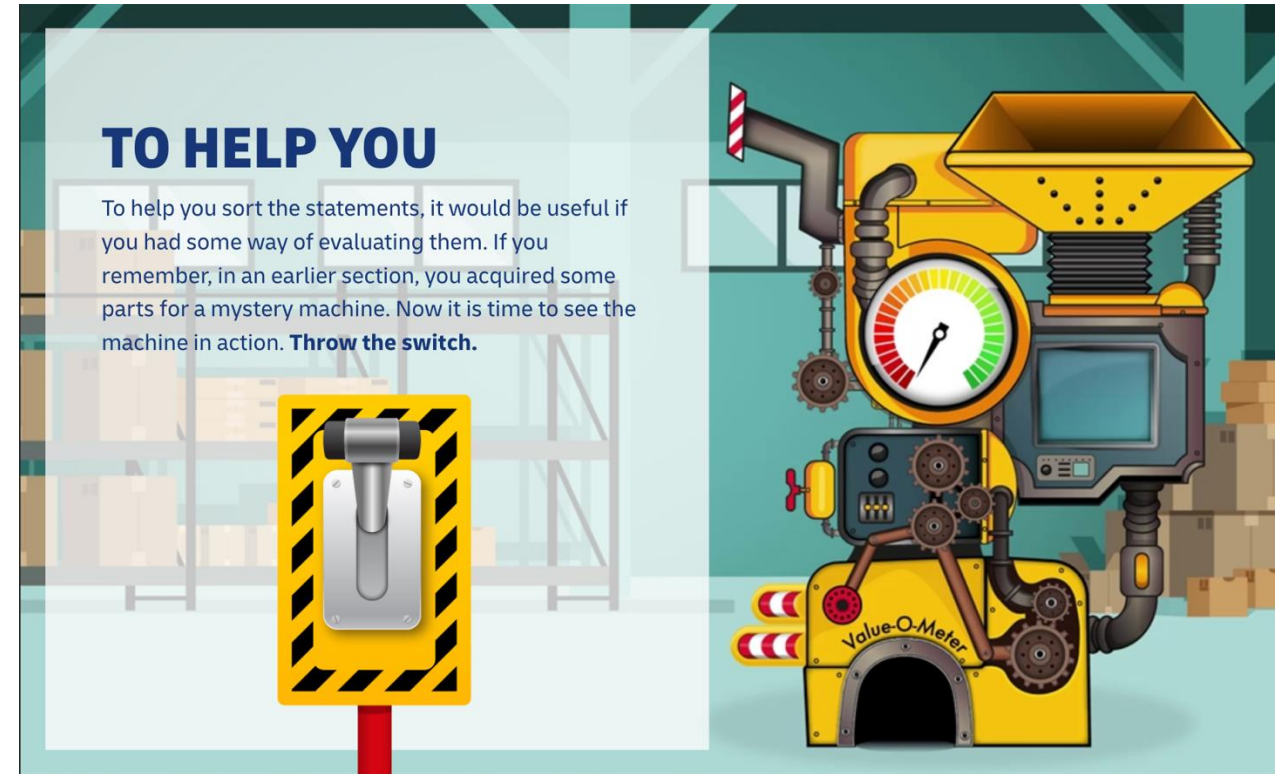| High Level Design | Innovation & Creativity | Detailed Design | Development |

Step 2: Innovation & Creativity

Engaging Digital-learning is driven by interactivity that can:

- Make you think

- Put you in someone else's shoes

- Make learning painless, even when it's challenging

TO HELP YOU

To help you sort the statements, it would be useful if you had some way of evaluating them. If you remember, in an earlier section, you acquired some parts for a mystery machine. Now it is time to see the machine in action. **Throw the switch.**

High Level Design

Innovation & Creativity

Detailed Design

Development

Step 2: Innovation & Creativity

It can take learners

- Inside a comic book to learn negotiation skills...

High Level Design

Innovation & Creativity

Detailed Design

Development

Step 2: Innovation & Creativity

It can take learners

- Inside a treasure hunt to gather situational knowledge for a case study...

High Level Design
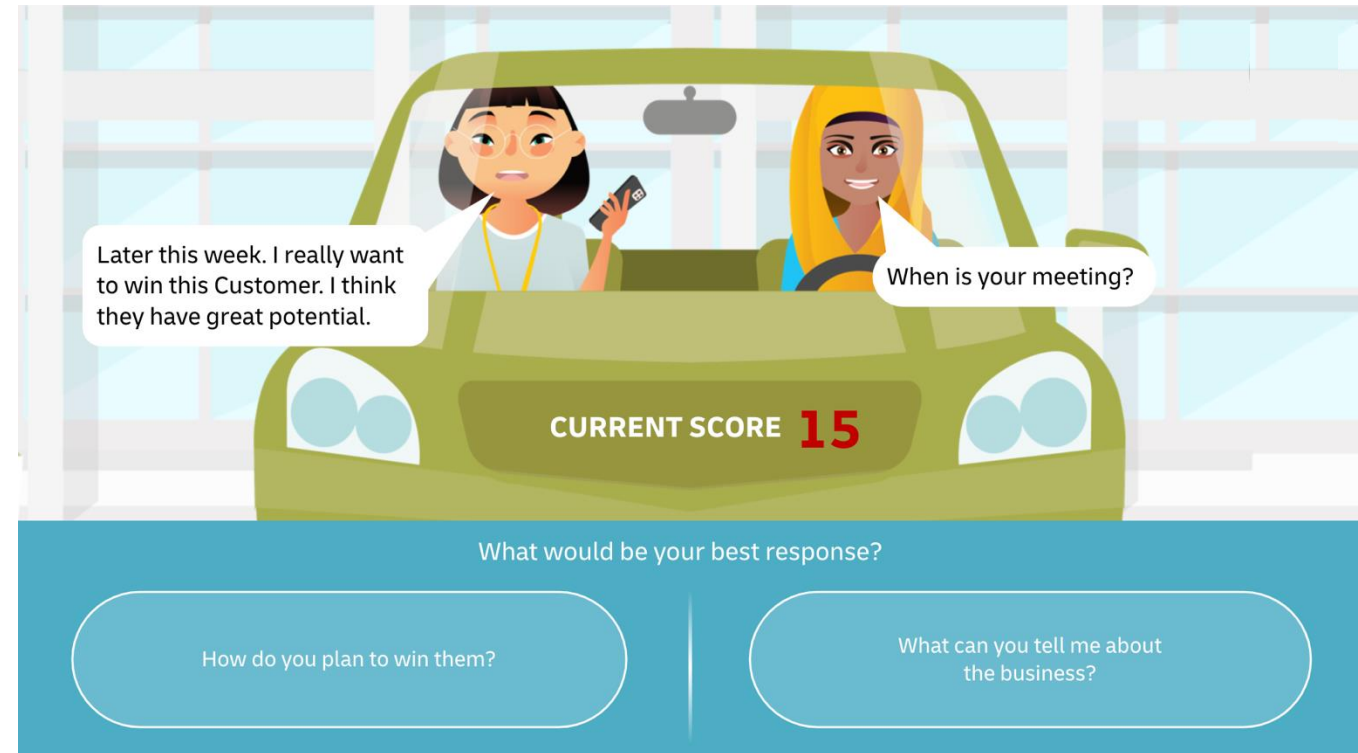
Innovation & Creativity

Detailed Design

Development

Step 2: Innovation & Creativity

It can take learners

- On a drive to learn how to coach...

High Level Design → **Innovation & Creativity** → **Detailed Design** → **Development**

Step 2: Innovation & Creativity

It can take learners

- Inside a board room to practice talking to a senior executive...

| High Level Design | Innovation & Creativity | Detailed Design | Development |

Step 2: Innovation & Creativity

It can take learners

- Inside a pet shop to tell a story about what customers really want...

High Level Design

Innovation & Creativity

Detailed Design

Development

Step 2: Innovation & Creativity

It can take learners

- On a rocket ship to learn how to keep salespeople on target...

| High Level Design | Innovation & Creativity | Detailed Design | Development |

Step 2: Innovation & Creativity

Important:

- Don't use a creative approach just 'to be creative'

- Use the approach that will produce the outcomes you want

- Know your learning objectives before you 'get creative'

- Remember, this is likely to be new to your learners. Don't let your familiarity fatigue influence you to skip the basics and 'start in the middle'

High Level Design → Innovation & Creativity → Detailed Design → Development
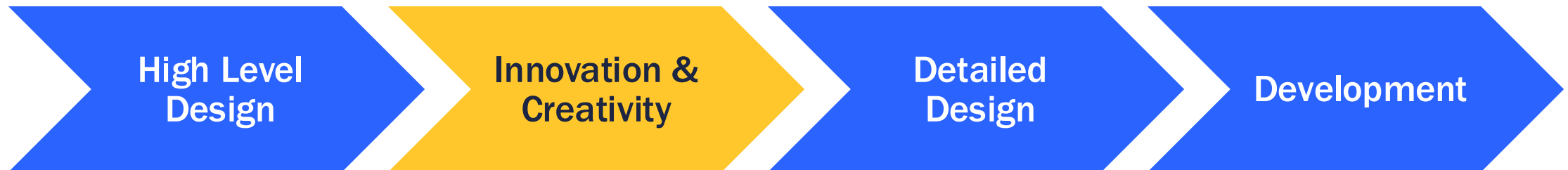
Step 3: Detailed Design

The detailed learning design (DLD) specifies EXACTLY what will the learner:

- See...
- Hear...
- Do...
- In what order...

...to produce the learning that will meet objectives

High Level Design	Innovation & Creativity	Detailed Design	Development

Step 4: Development

Development makes it real.

- Final images
- Working interactions
- Completed video and audio (where called for)

| High Level Design | Innovation & Creativity | Detailed Design | Development |

An Example

Let's use the spaceship course as an example.

- The purpose of the learning is to support Sales Managers in creating an Area Growth Plan to manage their sales teams to meet targets.

Building Your Area Growth Plan

Business Rationale:
Sales Managers, like any other role, have a learning curve, becoming increasingly effective as they gain experience. This milestone is intended to shorten that learning curve by providing the information and developing some competencies Sales Managers need to be effective from day one, so the team can stay on track meeting targets to produce greater revenue.

Purpose: The SM has to have their own plan for their team, they will be able to show how their plan is achievable by having achievable plans from their SEs

Learning Strategy: E-learning chunk for initial learning, followed by a guided walkthrough for hands-on practice.

Learning Objectives: After completing this topic, the Sales Manager will be able to:
- Define what an Area Growth Plan is and describe its purpose
- Discuss the interplay between team targets and individual Sales Executive growth plans
- Develop an achievable area growth plan that hits targets

Learner Experience:
After completing this milestone, the Sales Manager will feel:
- More confident about effectively carrying out the cadence of Sales Management activities.
- Greater clarity and confidence about creating a plan that achieve team targets.
- Excited about the role they have accepted and begun

Key Take-Aways:
- I need to understand the big picture about where my team is in achieving our given targets and who is driving what growth so I can set a direction before I start coaching on individual plans
- The targets I receive and agree to at my Area Planning Session will always be growth targets
- My Area Growth Plan is a bridge between company focus/targets and individual SE targets
- The plan is living and dynamic; I must constantly adjust it to the current situation
- My Area Growth Plan should be achievable and based on accurate data
- I know how to create an area growth plan, based on an example

Learning Outcome: The Sales Manager will be able to create a clear Area Growth Plan linked to their individual Sales Executives' Plans.

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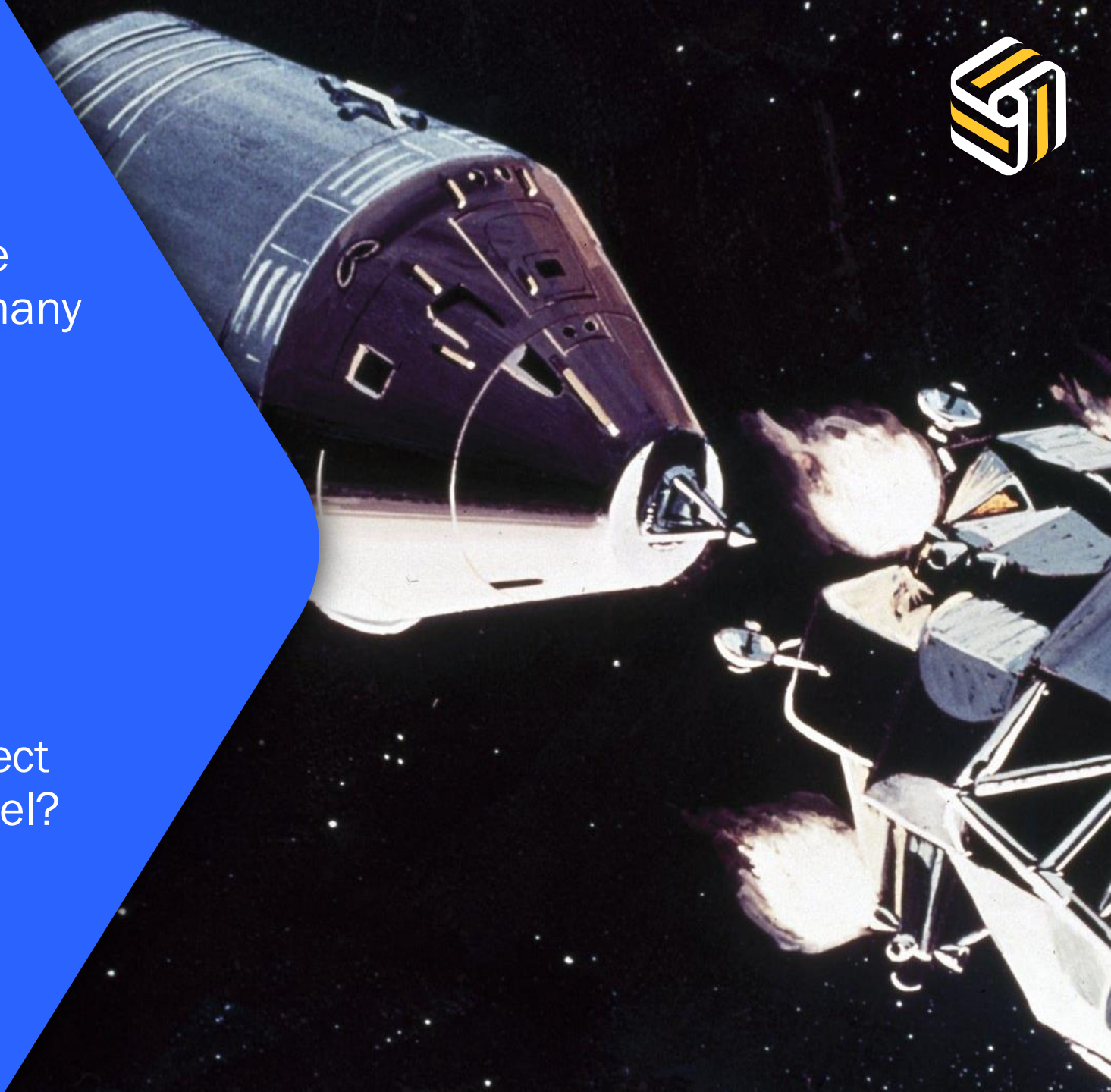
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- We planned for a specific emotional impact on the learner.

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An Example – I&C

During I&C, we remembered that the first astronauts to the moon made many course corrections to stay on target.

This is not unlike a Sales Manager making course corrections for their sales team!

We made it a game. Could they correct their course before running out of fuel?

An Example - DD

The detailed design is:

- Done by the ID in PowerPoint
- A communication to the developer showing exactly what to build.

It includes:

- Prototype images
- Text
- Audio
- Interaction instructions
- Feedback instructions

An Example - Development

The developer converted the DLD into a working learning module.

This included:

- A better image of a spaceship

- Functional controls to input answers

- Animated movement showing the spaceship moving on and off course

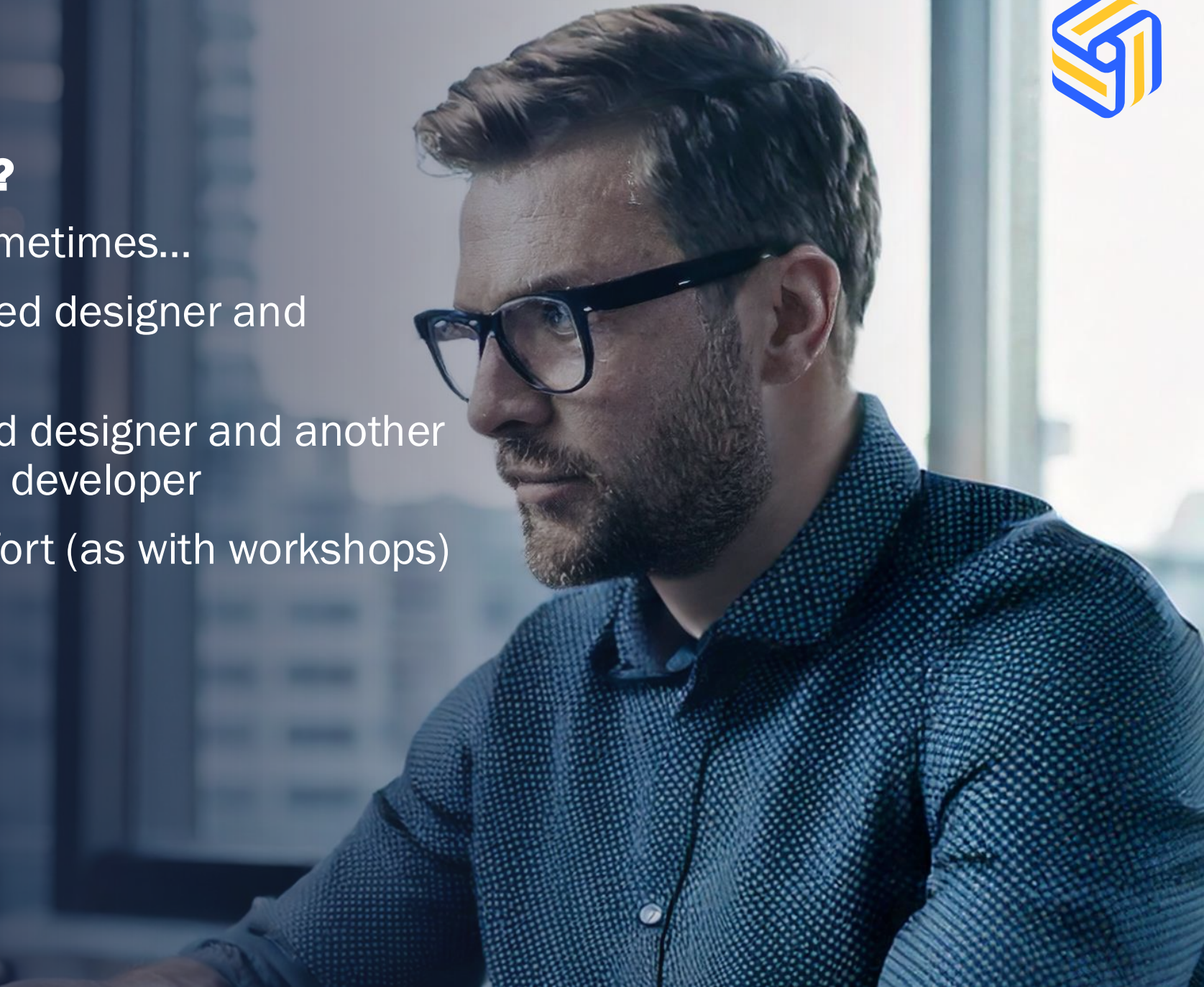- Audio of alarms for getting off course or having low fuel

Who Is the Developer?

At STR, it depends. Sometimes...

- The ID is both detailed designer and developer

- The ID is the detailed designer and another team member is the developer

- It's a larger team effort (as with workshops)

Where Does AI Help?

We find generative AI to be most useful during development

Gen AI allows us to:

- Create custom images in seconds
- Produce videos without actors and studios and in hours instead of days

This saves a significant amount of time and budget!

Why Not Earlier in the process?

AI can help write HLDs, but...

Humans need to:

- Identify the desired outcomes
- Refine learning objectives to make sure they are *really* what you want to accomplish!

Why Not Earlier?

For DLDs, we've found:

- It can write boring 'tell & test' learning.
- It can't:
  - Write from the learner's perspective
  - Design complex interactions and workshops

Humans are still better at that.

To Finalize the Project...

The key to delivering a project is the feedback loop:

For digital learning:

- If the DD is signed off, typically only 10-15% might change during development

- Once development is signed off, we proof and conduct user testing before delivery of files

Workshops are more complicated:

- A walkthrough tests the flow and experience. Expect 35-40% of the development to date to change

- A Pilot runs as live. Expect 5-10% change

- All assets are proofed before delivery.

Ensuring success

An effective Process needs effective people to utilize it.

The process tells us what to do; we have to apply it with the right team

Here's who is typically involved:

Have a series of characters with the roles:

- SME
- ID
- Project Manager
- Graphics Designer
- Developer

(As noted earlier, some people might wear more than one hat! For instance, in small teams, the ID is typically also the Project Manager.)

Map the person to the role

Has the knowledge and skills that you wish to impart to the learner

Debbie — **SME**

Rob — **Developer**

Hannah — **Project Manager**

James — **Designer**

Isobel — **ID**

2

Map the person to the role

Determines the right experiences and flow to ensure learning outcomes achieved

Debbie	Rob	Hannah	James	Isobel
SME	**Developer**	**Project Manager**	**Designer**	**ID**

Map the person to the role

Creates the the final imagery and layout to implement the desired experience

Debbie	Rob	Hannah	James	Isobel
SME	**Developer**	**Project Manager**	**Designer**	**ID**

Map the person to the role

Build the digital experience using standard tools and applications

Debbie — SME

Rob — Developer

Hannah — Project Manager

James — Designer

Isobel — ID

Map the person to the role

Does a final review to ensure it delivers against the objective and outcome

Debbie	Rob	Hannah	James	Isobel
SME	**Developer**	**Project Manager**	**Designer**	**ID**

Tips on ensuring relationships work

- Clearly communicate roles and responsibilities

- Ensure people know the mindset of their colleagues
  - SME – All about what they want to tell – focus on facts
  - ID –Blend of science-based knowledge and creativity
  - Project Manager – Detailed, thinks in spreadsheets
  - Graphic designer — Sees the world in terms of design and imagery
  - Developer — technically oriented, bends software to their will

A Managed Process

Creating effective learning experiences on time and within budget requires management:

- Once Objectives and Outcomes are set (HDL) any changes will ripple downstream and impact delivery dates.
  - Have a change process in place!

- Once Innovation & Creativity agreed, can more realistically set the timeline.
  - If there is a hard deadline, that might impact the choice of learning experience!

- Once the Detailed Design is agreed, and development starts, remember that there will be changes before the final delivery (up to 40% for workshops!).
  - The changes should be based on learning experiences, not because the SME has more to share

- Changes should be based on learner feedback, but remember:
  - Feedback is personal and may not reflect the broader views of the target audience.

Build and they will come

- So, we now know how to build engaging learning that is truly awesome

- BUT

  - We must launch it

  - Role it out

  - Reinforce it

  - End the journey with people who are unconsciously competent at the things the business wants them to do, in the way the business wants them to do it

- This is a whole new conversation, and we will come to that next month

THANK YOU!

Mining Your Subject Matter Expert's Genius: Inside the Process

Who are STR?

Since 2008, STR has delivered Sales and other programs that drive measurable behavioral change and align employee efforts with long-term strategy, achieving results like a 1000% ROI for our very first client.

Our approach extends way beyond Sales, helping all functions connect with strategic objectives and adapt through continuous learning. STR's learning programs close skills gaps, foster alignment, and deliver real business impact.
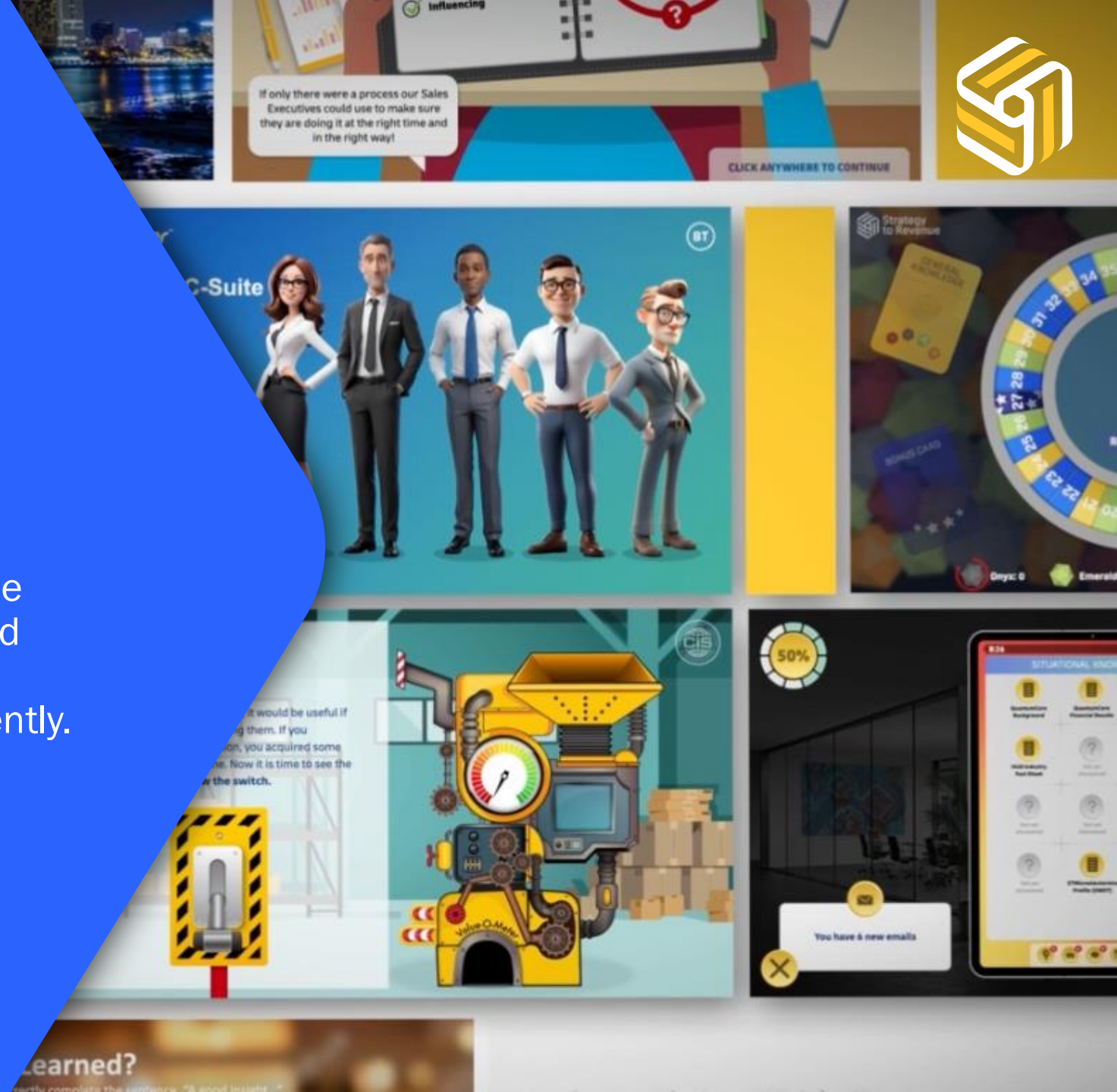
What do we do?

We design and develop learning content specifically targeted to your organization's needs, strategic goals, and unique culture.

Tell us what you need, and we will create the right learning to engage your employees and achieve your objectives, using the latest technology to get it done quickly and efficiently.

Get in Touch

Any questions, comments or enquiries? Let us know:

mark.savinson@strategytorevenue.com

calum.shepherd@strategytorevenue.com