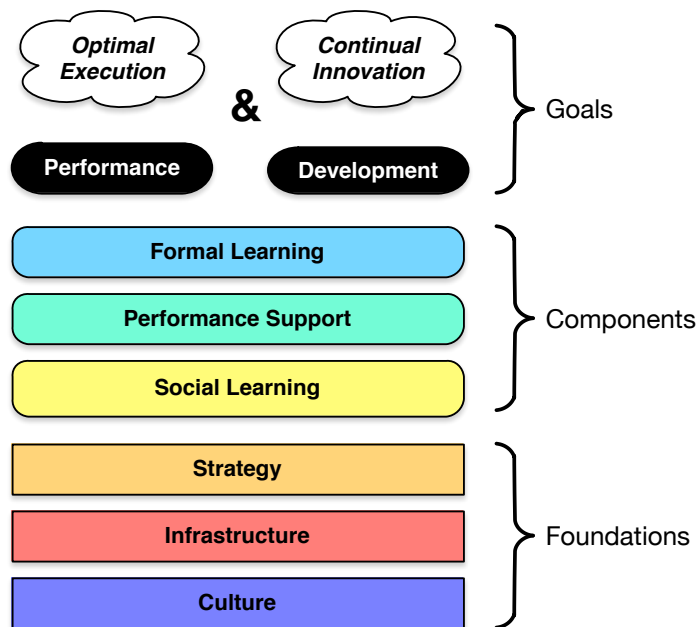


Revolutionize Learning & Development: Performance and Innovation Strategy for the Information Age Steps to Change by Roles

In the book [*Revolutionize Learning & Development: Performance and Innovation Strategy for the Information Age*](#), I make the case that there needs to be a shift. L&D departments can no longer consider training and courses to be the sole solution to all ills. At core, the base premise is that organizations can no longer afford to only focus on optimal performance, but must also drive continual innovation. I argue that L&D should go for social learning first, performance support second, and formal learning last. I also emphasize that a concerted foundation of technology infrastructure, implementation strategy, and learning culture is required.



This revision of focus does not directly align with current organizational structures, but I believe there needs to be a shift in organizational roles as well as a shift in awareness and focus. This leaves open the concern of how to get there from where we are presently.

As a rough guide, the proposal here suggests that a path of four steps can lead to the necessary shifts to a new structure. The necessary new roles will be performance consultants, who look at performance issues and determine what solutions should look like; and development facilitators, who foster learning, cooperation, and collaboration skills. Then, at levels of management up to executives, there needs to be a shift of emphasis both within and outside L&D. Ultimately, the book proposes that we rename the unit from learning and development (L&D) to performance and development (P&D).

So, what do those shifts look like, and what are the necessary knowledge and skills?

Trainers

Role	Status Quo	Step 1	Step 2	Step 3	Step 4	End Game
Trainers	Stand up presenters	Deeper Learning	Social	Innovation	Facilitation	<i>Development Facilitator</i>

To use a very coarse stereotype, a trainer is a “people person,” and as a role, the facilitator should be a people person. Consequently, in a shift from a paradigm of “all courses all the time,” trainers are the natural candidates to become development facilitators. This requires a path of development that not only builds the skills of facilitation, but also builds knowledge of the areas of facilitation.

The proposed path is to first get deeper about learning. An important component is understanding the need for meaningful practice and reflection, and strategies for blending and flipping the classroom. Meta-learning will also be important. There will still be a role for courses, and trainers aren’t likely to shift completely in the early stages, but facilitating individual learning will also be a role.

The second step is to understand how the social aspect of training functions in both formal and informal learning. Facilitators need to know why social learning is valuable for deepening formal learning, and why social interaction is critical for innovation. There are skills in learning and working together that should not be taken for granted.

A subsequent step is to understand innovation more deeply. Innovation will be the major driver of business success; and in a shift to performance and development, the elements that foster, and hinder, innovation need to be known and developed. For this step and the previous one, an understanding of the tools available to facilitate learning and working together is important. This means trying out new tools as well as coming to grips with the existing ones.

Finally, the ability to facilitate is not to be taken lightly. Just as there are skills to work and play well together, there are also skills involved in helping people work and play well.

Ultimately, trainers will move from delivering classroom instruction through learning facilitation, to facilitating the wide spread activity that delivers organizational outcomes.

Instructional Designers

Role	Status Quo	Step 1	Step 2	Step 3	Step 4	End Game
Instructional Designers	Information Presentation	Deeper Learning	Performance Consulting	Social	Strategy	<i>Performance Consultant</i>

Instructional designers need to apply their skills beyond courses, and start leveraging performance support and the network. They need to become performance consultants, where they identify performance gaps and call upon the appropriate resources to overcome the barriers. This role is more focused on optimal execution than innovation, but the network plays a role as one of the available resources.

Deeper learning, however, plays a role here too. While many instructional designers do have the requisite knowledge, many clearly do not. Most importantly, they need to shift how they design to create learning experiences that achieve meaningful outcomes and evaluate what they are doing.

This leads to the second step—understanding performance consulting. Designers need the ability to: assess performance gaps; identify root causes; design solutions that appropriately draw from the network, performance support, and courses; and evaluate them.

Understanding the network as a resource means also understanding the ways in which social networks work. The power of cooperation and collaboration should be tapped into to meet organizational needs. User-generated resources should be part of the solution.

Ultimately, instructional designers need to become strategic in developing solutions that draw upon and build capability. The necessary perspective is evaluating a solution in terms of the cost versus the impact, and going beyond efficiency to look at impact.

Instructional designers need to draw upon a process that recognizes information can be in the world, not just in the head, and design solutions that lead to real impact.

L&D Managers

Role	Status Quo	Step 1	Step 2	Step 3	Step 4	End Game
L&D Managers	Order taking	Performance Consulting	Business Metrics	Infrastructure	Strategy	P&D Manager

Managers need to shift from learning and development to performance and development (P&D). This means understanding the different roles and tools, and leveraging technology to drive meaningful change.

The first step is to understand the difference between instructional design and performance consulting. The must move from order taking to meeting real organization business needs. Which means focusing on business metrics, ones that will make a difference to the organization. Things that matter to business units, like increased sales, decreased time to trouble shoot, fewer manufacturing errors, etc, have to be the targets of initiatives, not cost per hour of seat time.

From there, P&D managers need to start understanding tools not only for designing and delivering courses, but for delivering and creating resources, and for the performers to do that too. Further, in addition to tools to communicate and collaborate, performers may be creating resources as well. How to use those tools is the responsibility of the P&D manager to facilitate through the P&D group.

To put this together, to create a performance ecosystem, managers will have to start getting strategic, understanding the richer skills required (adding information architecture and social facilitation) and developing the resources and abilities necessary. Manager will also have to start practicing what is preached, working and learning ‘out loud’ to be leading the way.

L&D Executives

Role	Status Quo	Step 1	Step 2	Step 3	Step 4	End Game
L&D Executives	Measuring efficiency	Business Metrics	Infrastructure	Strategy	Culture	P&D Executive

L&D executives, on the path to becoming P&D executives, must get their mind around the shift to supporting innovation as well as performance. And in addition to strategy, they have to get their mind around culture.

P&D executives must start looking at their impact on the business, not just efficiency. They too will have to focus on impacts, but on the organization as a whole, and start including other metrics like meaningful activity in the network, rate of idea generation and implementation, and more.

P&D executives will have to develop a vision of the performance ecosystem, and start working with IT to successfully develop an integrated solution, not isolated elements. They will have to get strategic about the path to get there, and about the managers' abilities to accommodate the shift.

Ultimately, P&D is going to have to be concerned with the corporate culture, helping the rest of the organization comprehend the necessary shift and then lead the change to optimize the success of the organization. Just as with the managers, the executives are going to have to similarly practice what they preach and work, and learn, out loud.

Outside P&D

There are roles that P&D cannot control, but must influence. At the top, executives must understand and embrace the opportunity that P&D presents for organizational success. Business unit managers must begin to work with P&D by recognizing that collaborative efforts, which are designed to impact metrics and evaluated, is the path to useful change. IT also needs to be a partner in developing the necessary infrastructure for innovation to flourish.

P&D needs to be proactive to achieve this. The actions taken will need to be practiced within P&D—with a community, with documented benefits emerging, and with continual experimentation. The shift will also take explanation—why it is necessary and of benefit to the organization.

IT

Role	Status Quo	Step 1	Step 2	Step 3	Step 4	End Game
IT	Network	Social	Innovation	Infrastructure	Strategy	Infrastructure Enabler

IT needs to get on top of the role social media plays in innovation to develop a performance ecosystem view of infrastructure. They ultimately need to understand the strategic benefit of a performance ecosystem approach.

IT first will need to understand the relationship between social interaction and innovation. There may well be a learning curve there, but it is essential to 'buy in' before IT will really embrace the changes to the environment.

IT will have to manage a more tightly integrated infrastructure while maintaining their usual metrics of reliability and security. Similarly, they need to be practicing the working and learning out loud approach, helping others understand their side of the changes.

IT will be a fundamental partner in the change, and work successfully to understand the needed role and actively engage in the change.

Business Unit Managers

Role	Status Quo	Step 1	Step 2	Step 3	Step 4	End Game
Business Unit Managers	Training as solution	Business Metrics	Performance Consulting	Social	Infrastructure	P&D as Strategic Partner

Business unit managers need to understand that P&D needs access to business metrics, and that courses aren't the only answer. They will need to understand how social facilitation benefits their outcomes, and the need for a vibrant infrastructure to support it.

First, business unit managers will have to understand that the old approaches to training were a too-limited solution to complex problems. They will have to participate in sharing their data to make meaningful changes, and why performance consulting is needed.

Like IT, these managers will need to understand the business value of social interaction, and be willing to support the transition to the new infrastructure and way of working.

Executives

Role	Status Quo	Step 1	Step 2	Step 3	Step 4	End Game
Executives	Training = cost center	Culture	Strategy	Innovation	Infrastructure	P&D as Strategic Enabler

Finally, executives need to get their mind around the notion of facilitated interaction. They need to understand the benefits of a culture that supports cooperation and collaboration, that strategy involves making P&D pervasive in the organization, and that courses aren't the only component. They also need to grasp the elements necessary for innovation, as well as the concept of the performance ecosystem infrastructure.

Executives will need to embrace the new opportunities, recognize the challenges, support the change, and lead by example. Ultimately, a successful change will only come with the active support of the organization's leadership.

Summary

Realize that the above in no ways suggests that anyone has to choose the recommended path. This is just one possible approach. If you look at the ASTD workplace competencies (indicated in Appendix C of the book in abbreviated form), the full suite of competencies should be in the skill set for everyone in the operational areas of the P&D suite.

This characterization is inherently and intentionally loose, intended to differentiate by role rather than provide a foolproof path forward. What people need depends on where they are already; and things are really more complexly intertwined than a simple four-step map can support. Regardless, this framework hopefully provides some guidance for thinking about opportunities for change and the ways to get there.

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L&D Managers	Order taking	Performance Consulting	Business Metrics	Infrastructure	Strategy	<i>P&D Manager</i>
L&D Executives	Measuring efficiency	Business Metrics	Infrastructure	Strategy	Culture	<i>P&D Executive</i>
IT	Network	Social	Innovation	Infrastructure	Strategy	<i>Infrastructure Enabler</i>
Business Unit Managers	Training as solution	Business Metrics	Performance Consulting	Social	Infrastructure	<i>P&D as Strategic Partner</i>
Executives	Training = cost center	Culture	Strategy	Innovation	Infrastructure	<i>P&D as Strategic Enabler</i>

Author Information

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The logo for Quinnovation features a large, stylized letter 'Q' in a dark blue color. To the right of the 'Q', the word 'UINNOVATION' is written in a teal or light green color. The letters are bold and sans-serif, with a slight shadow or gradient effect.