NovoEd

5 Steps To Learning Experience Design

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Introduction

The Modern Learner

The world is getting faster and more connected as digital and social media become more pervasive in our daily lives. A national survey conducted by the Pew Research Center in 2016, found that 86% of American adults use the internet, and 79%[1] of those online use Facebook. Five years ago, you may not have heard someone say, "My grandmother liked my photo on Facebook," but today, more people have found comfort with internet and modern technology.

Additionally, millennials are now the largest population in the workforce,[2] and demand for better training and leadership development practices has already begun to emerge. Most millennials believe that they are not getting the development they need, and only 15 percent of companies believe they have a strong millennial-focused leadership program.[3] Furthermore, an employee survey conducted by CEB in 2016 indicated it is not only millennials who prefer modern methods of professional development. Baby boomers responded at similar levels as millennials regarding their desire to learn from peers (60% of millennials vs. 62% of boomers) and a desire to access information "just-in-time" (55% of millennials vs. 55% of boomers).[4] This indicates that the majority of the workforce now self-identifies as "modern learners."

Despite the revolution in technology and the increasing number of modern learners within the workforce that embrace it, many organizations and institutions still have archaic methods and tools for training and development. Research conducted by Deloitte states that most "corporate LMS systems have been designed for the old model of e-learning—they typically have difficult-to-use interfaces and they view video as an afterthought."[5]

Why do we still have hour-long webinars where participants are disengaged? How can we ensure our learning experiences stay engaging and meaningful as we compete against ever-shrinking attention spans?

These questions inspire us. We are changing the way that organizations and institutions approach teaching and learning. Since 2013, we have worked with hundreds of organizations to hone an approach we call the 5 Steps to Transforming Learning Experience Design.

1   http://www.pewinter net.org/2016/11/11/so cial-media-update-2016

2   http://www.businessin sider.com/39-ways-the-american-workforce-is-changing-2015-6

3   The Deloitte Millennial Survey 2016: Winning over the next generation of leaders, Deloitte Consulting LLP, 2016, http://www2.deloitte. com/global/en/pages/about-deloitte/articles/ millennialsurvey.html. Bersin by Deloitte High-Impact Leadership research, 2016

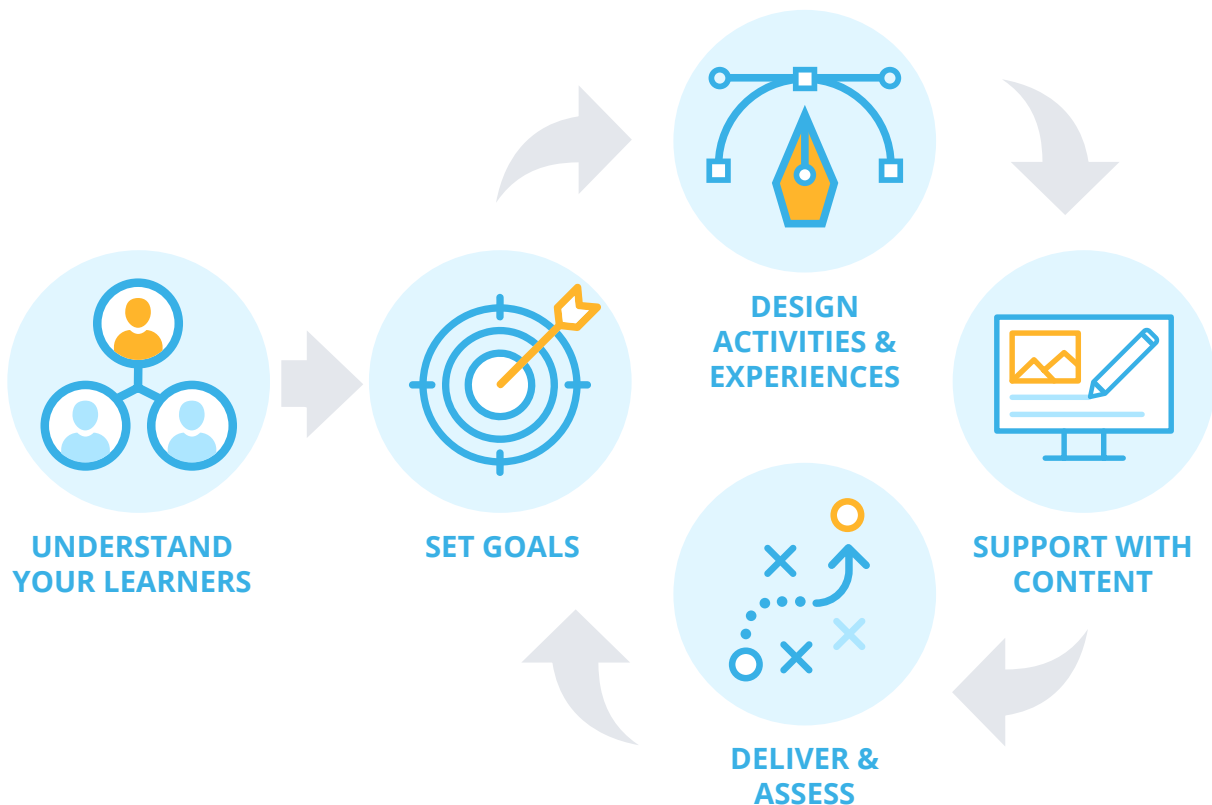4   CEB 2016 L&D Digital Learning Survey

5   Predictions for 2017: Everything is Becoming Digital, Deloitte Consulting LLP, 2016

The Process and Pedagogy

This five-step approach to learning design is used to create effective and engaging learning experiences which take place online, in the workplace, and in the real world. Learners of all ages and backgrounds have enjoyed our modern approach to learning, but the impact of this approach goes beyond learner satisfaction. Learning with NovoEd has resulted in the creation of new startups, increased employee effectiveness, and the accomplishment of strategic business goals for Fortune 500 companies.

Based on the principles of Backwards Design, project-based and collaborative learning, peer feedback, the ADDIE model for instructional design, and the Kirkpatrick model for evaluating the effectiveness of training, we've simplified our years of experience and research into a simple guide to jumpstart your next project. Please enjoy our **5 Steps to Transforming Learning Experience Design**, and may you continue to find effectiveness, creativity, and joy in designing your future learning experiences.

UNDERSTAND YOUR LEARNERS

SET GOALS

DESIGN ACTIVITIES & EXPERIENCES

SUPPORT WITH CONTENT

DELIVER & ASSESS

Note: This is an iterative process. Analysis happens both at the beginning and end of the process in order to inform the next learning experience design.

STEP 1
Understand Your Learners

Align to your Organizational Goals

Certain training programs, while viewed by participants as enjoyable, are ultimately ineffective because they are not aligned to larger organizational goals nor are they addressing crucial learning gaps. This step of analysis is often forgotten by designers, as they assume they know the problem they are designing for, but spending an additional month analyzing the context of the organization will prove beneficial in the long run.

Get To Know Your Learner

Take the time to discover the current state of skills, knowledge, and existing training programs in your organization. Knowing what your target audience knows versus what they need to know is essential in guiding the design of your learning experience. Too often, this step in the process is truncated or skipped over, because we think we know the problem. But do we really know?

> **Knowing what your target audience knows versus what they need to know is essential in guiding the design of your learning experience.**

Questions to Ask

Here are a few questions to help you learn more about the current state of learning at your organization:

1. What are the larger goals of our organization or institution? What, as a whole, are we trying to achieve ?

2. What are the skills and knowledge (competencies) that are most essential to achieving these goals?

3. Who are my learners ?

4. What do my learners currently know and what do they struggle with?

5. What training programs, or curricula currently exist , and how effective are they?

6. What established resources currently exist to support training or learning initiatives?

7. What formats/methodologies (in-person, online, blended) will be most effective for achieving learning outcomes?

8. What budget and personnel are needed to design and implement a new training program?

There are a few methods to discovering the answers to these questions. The most effective method is to interview members of key levels of the organization. Surveys tailored to your audiences (i.e. questions about big goals to C-level staff, questions about learning needs to employees) are more efficient, and will help you find the answers you're looking for.

CASE STUDY

Fortune 50 Bank discovers "community" as a key learning need

In the fall of 2016, a Fortune 50 bank assessed the shifting landscape of their organization as global offices were opening rapidly. The instructional design team initially designed a learning program to address one need of the bank's new office employees: ensuring they understood the financial products the bank sold.

However, after spending further time investigating the needs of the new employees, the team realized there were additional goals that could be addressed in an online learning solution. The team determined that understanding the day-to-day operations of the bank, as well as establishing connections with the larger employee community, was valuable to helping new employees feel comfortable in their new work environment.

The onboarding program was expanded to address these learning needs by designing learning goals tailored towards each of these outcomes through: a) developing assessments to test product knowledge, b) developing content to have current employees describe their roles and day-to-day experiences, and c) creating globally diverse teams to allow for connections across offices.

The instructional design team and their participants benefitted from the additional time spent asking questions like, "Why are we doing this?" and "What do my learners really need to get out of this experience?" The program resulted not only in improvements in the employees' product knowledge but also a better understanding of the bank's culture and a greater sense of inclusion.

STEP 2
Set Goals

Set Impact Goals First

Hopefully, your analysis of the state of learning at your organization has brought you insights regarding the design of your learning experience. The next step is to begin setting goals.
A useful framework to use for goal setting is the Kirkpatrick Model, which evaluates a training program in 4 key areas (see figure below). While this model is often used for training evaluation in professional development contexts, the concepts can be applied to academic institutions when considering the purpose or value of a course in supporting the overall institution's goals for its student population.

The New World Kirkpatrick Model[6] for Training Evaluation

1	**2**	**3**	**4**
REACTION	**LEARNING**	**BEHAVIOR**	**RESULTS**
The degree to which participants are actively involved in and contributing to the learning experience	The degree to which participants acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the training	The degree to which participants apply what they learned during training when they are back on the job	Short-term observations and measurements suggesting that critical behaviors are on track to create a positive impact on desired results

6 http://www.kirkpatrickpartners.com/OurPhilosophy/
TheNewWorldKirkpatrickModel/tabid/303/Default.aspx

The levels of the Kirkpatrick Model correspond with increasing impact that the learning experience had on affecting real behavior change in the workplace (or other contexts). Thus, the alignment of a program's learning goals with the larger goals of the organization is crucial. In planning to have the greatest impact with your training program, it's best to start backwards at Level 4, to think about the specific activities/behaviors/knowledge that will help achieve an organization's larger goals.

After planning for level 4 results, you can then set goals around specific job-related behaviors or work products that you'd like to see as a result of your training. For example, if improved Customer Satisfaction is an organizational goal, you may identify improved customer communication as a level 3 goal. Next, break down this goal into smaller competencies related to the concept of "communication" (e.g. active listening, anticipating customer needs, and verbal skills). These competencies should be clearly defined for your learners, explaining what an exemplary demonstration of active listening looks like versus a poor demonstration. With these competencies defined and illustrated, learners will develop a self-assessment regarding their abilities/knowledge and have a clear roadmap for their own development.

Level 1 of Kirkpatrick's model is what is most commonly used to assess the effectiveness of a training program (sometimes referred to as "smile sheets"). While a learner's impression/enjoyment of a learning experience is important, it should not be confused with deeper levels of results-oriented impact. While keeping in mind a positive learner experience, a learning experience design should first and foremost aim towards achieving larger organizational outcomes.

Make sure your learning objective is phrased as "learners will be able to..." rather than "learners will learn ..."

Set "Doing" Goals, Not Learning Goals

Now that you've determined what you want your learning program to achieve, it's time to create bite-sized learning experiences, which can be described as modules or lessons. Each module or lesson should have a distinct set of learning objectives which defines the purpose of that experience and its outcome. Ideally, the fewer learning objectives you are trying to accomplish in one module will result in a greater likelihood that those objectives will be met. However, related learning objectives (e.g. utilizing clear speaking practices and applying active listening) can sometimes be incorporated into one lesson.

Make sure your learning objective is:

- Outcome oriented - What will the learner use to demonstrate their acquisition of new knowledge or skills? A useful sentence starter used to ensure an objective is outcome oriented is the following "Learners will be able to _____"

- Meaningful or relevant - Your learners should be able to clearly see the connection between a learning objective and their day-to-day work. Often times, authentic deliverables such as completing a performance review, developing a meeting agenda, or applying new communication skills with a colleague can be designed to allow learners to feel that the learning experience is really an extension of their job, not an additional component.

- Achievable - With a clear understanding of your learners' skill gaps, it's important to design learning objectives that can be achieved within an allotted timeframe. Learning goals that are too ambitious can leave learners frustrated.

Often times, designers will think first about the experience they want to give the learner or the topic they wish to present. While this may result in achieving Level 1 goals, it does not guarantee a real impact in lasting behavior change. Thus, when designing a lesson, it is important to begin with determining the learning objective (or objectives) for the lesson.

CASE STUDY

Design firm utilizes a framework for creativity to set learning targets

A leading San Francisco-based design firm was interested in sharing their methodology with the broader public. They wanted to help designers and innovators improve in their craft by developing creative solutions to problems with a user-centered design. They started by defining their methodology as a discrete set of behaviors or skills. They determined that the most important skills in developing user-centered insights for creative design were defined by the following learning objectives: developing observation skills, identifying extremes, conducting user interviews, experiencing perspectives through empathy, and finally, turning those experiences into actionable insights.

When these learning objectives were identified, they were used as the guiding framework for the course, with five concrete lessons to be built to achieve those objectives. If learners could achieve these objectives in sequence, they would not only have the skills necessary to be more creative designers, but also understand the logical progression of this process. Thus, activities were then designed with accompanying expert testimony and demonstration of the skills in action.

This guiding framework, with five distinct skills explicitly laid out for learners, allowed learners to gain a true sense of accomplishment as each of these skills was mastered. This resulted in not only positive reviews for the course, but also greater learner scores in terms of self-confidence in their creative abilities.

STEP 3
Design Activities & Experiences
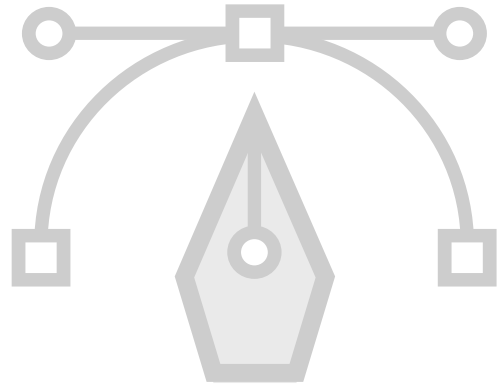
Design for Real Challenges, Not Knowledge Recall

You've defined your learning objectives. How will you know that your learners have achieved these objectives? For this step, we like to utilize the concept of project-based learning (PBL), where learners must produce a deliverable which illustrates mastery of the objective.

Here, we are veering away from traditional means of assessment, such as exams with multiple choice questions. Instead, the assessments used in a transformative learning experience are ones that involve higher order thinking. We want learners to be designing, analyzing, and applying the concepts, rather than simply memorizing them.

You might be familiar with team-building exercises such as the "egg drop," where teams must construct a device to keep an egg from breaking after falling from a substantial height. While this can be an enjoyable activity, why not have people actually engage in an activity that more closely resembles the challenges they face? Let's be honest, raining eggs is not a challenge that we face daily.

Consider how much more challenging and worthwhile an activity would be when your learners develop something of authentic use .

The best assignments are those which are designed to have an authentic deliverable, one that would likely be used in the real world and have significant relevance to the learner's work or life. Some examples include:

- Developing one component of a business plan for their own venture each week, with the result being a complete business plan by the end of a six-week course

- Conducting real interviews with potential customers about a product to influence its design

- Designing a team meeting agenda to apply the principles of effective time management as a newly hired manager

In addition to an assignment's authenticity, consider how you might organize learners to collaborate on an assignment. While most online programs involve individual, self-paced assignments, try incorporating the community in a learning experience. For example, create collaborative assignments that involve delegation of responsibilities, perspective taking, or coordination among roles and geographies. Consider incorporating peer feedback as a follow-up assignment to allow learners to benefit from their peers' feedback and assignment submissions, rather than solely instructor content. These assignments can seem challenging to design, but providing a suggested process and defining what the standards are for successful completion will result in greater clarity for learners.

Three guidelines will help you ensure the quality of your assignments. Ensure your assignment:

- Provides opportunity for immediate practice/application of concepts

- Has clearly stated instructions/process for completion

- Includes clearly defined standards of expected quality

Government organization utilizes online teams for experiential learning

A government organization was interested in building a course that focused on the skills of building successful teams composed of diverse members. While they had clearly defined their learning objectives as building trust, managing power dynamics, and fostering a culture of innovation, it was not clear how these concepts were to be demonstrated by the learners.

They had successfully developed activities in workshops where participants were asked to form small teams and practice these skills over the span of a few hours. But how would this translate into an online format?

Realizing that team-building skills were best applied when working in teams, they decided to retain the format of their workshop and use virtual teams to apply these concepts Over the span of six weeks, learners watched videos and read articles that illustrated the key skills of team building then applied these ideas immediately in their virtual teams.

One of the most popular and effective activities the virtual teams engaged in was a "FailFest" where learners each shared one of their biggest failures and the lessons learned from it. Learners also designed a collaborative presentation to show mastery of team-building concepts in a real-life case study, where real stakeholders reviewed their work during a live webinar.

By allowing these virtual teams to apply the content immediately, the course was received as effective and experiential rather than theoretical. In post-course surveys, learners commented how they felt so comfortable with the activities that they planned to introduce these same activities in their work environments.

STEP 4
Support with Content

To Create or Curate Content?

Now that you have done the challenging work of discovering the real learning needs, setting appropriate goals, and designing activities to demonstrate knowledge, you need to provide resources to support your learners in achieving their goals. These resources often take the form of readings, videos, or click-through interactive experiences. At this point in the process of design, every designer must ask, "Should I create these resources, or should I curate them from existing sources?"

While many designers take pride in the development of their own learning materials, hours of work can be saved with targeted research for materials that other experts have already created. We often recommend that discovery of quality, relevant materials should be the first step.

> **Hours of work can be saved with targeted research for existing materials.**

Whether you are curating or creating these resources for your learners, there are a few guidelines we recommend to ensure your content is effective in helping learners achieve their goals.

Ensure your content is effective:

- **Use various media** — Enables processing through varied media (visual, text, audio, etc..). While learning styles are debated within the educator community, most people seem to learn better when they're taught in several different ways - especially if one is visual.[7]

- **Incorporate a variety of perspectives/sources** — Instead of introducing a framework or the perspective of one subject matter expert, consider having your learners take a critical lens to the content by sharing conflicting viewpoints and alternative expert sources. Your learners will gain a deeper understanding of the content when asked to analyze, critique, or debate the concepts presented.

- **Hook your learners** — Give your content a simple test of your own attention.Would you enjoy watching or reading the material you are sharing? Is this something you would find interesting or engaging? How can your content incorporate humor, impressive artwork, or fascinating facts to engage your learners?

- **Keep It Brief** — Additionally, as studies[8] have shown the inverse relationship between the length of video and the percentage of the video watched by learners, the phenomenon of "microlearning" has been popularized with millennials. Microlearning, (defined as learning in short, digestible, bite-sized units) allows for learners to access materials on the go via mobile devices, and can be consumed during a twenty-minute commute. Creating content in this smaller, bite-sized format not only benefits modern learners with smaller attention spans, but also can be easier, faster, and cheaper to produce for learning designers. Value your learners' time and attention spans by keeping videos short (six minutes or less).

7   https://www.youtube.com/watch?v=V-S_53HmEUA

8   http://pgbovine.net/publications/edX-MOOC-video-production-and-engagement_LAS-2014.pdf

CASE STUDY

Recorded interviews from global experts enhance learner experience

In the fall of 2015, a free online university for the social impact sector opened to the public. One course was designed to help small non-profit organizations determine whether or not they had the capacity to scale their organization to have greater impact. While most of the university's courses had one expert instructor deliver content via recorded lecture, one instructor took a different approach and received great acclaim from course participants.

The course instructor traveled through India and Pakistan to record interviews with CEOs and founders of organizations who could be used as a model for scaling their impact. These leaders represented the communities where this work was desperately needed and shared their stories of how they expanded their reach.

The course participants appreciated these stories, as it allowed them to connect with the stories of real social change agents, whom they aspired to emulate.

> *The course helped me by presenting the stories and the work of various development-oriented organizations, analyzing how they started and their progress, and finally reflecting on their successes or challenges to engage the community. What I liked the most was the variety of the causes the organizations studied focused on. I found the experience very beneficial, an eye-opener and an inspiration in many levels and I would recommend this course to people who work with local communities, those interested in initiatives focusing on community engagement and professionals who want to learn more on scaling their initiatives' reach through community engagement."*

STEP 5
Deliver & Assess
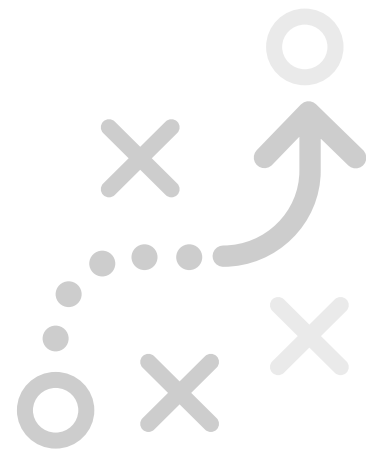
**Fearlessly Fail, Reflect, and Iterate
Now go for it.**

Put your design to a test with your pilot group of learners. In a future paper, we'll discuss more on how to ensure your pilot learning program is facilitated effectively. A good learning experience design is nothing without its proper execution involving managing a project team with clear roles and responsibilities, updating stakeholders along the way, and managing challenges as they arise.

No course design is perfect. Celebrate your wise design choices, but be open to making mistakes and learning from your experiences. While most learning experiences incorporate a post-experience survey to assess how learners performed, some designers incorporate opportunities for feedback every step along the way. Avoid being too attached to your design, as each iteration offers a new importunity for an improved experience.

Notice that steps 2-5 of this process are cyclical. As you determine the impact of your learning experience, it is also the time to revise the original goals for a new set of learners or to set new goals for a follow-up experience.

> **Celebrate your wise design choices, but be open to making mistakes and learning from your experiences.**

Conclusion

As learning designers, we are in a privileged position. Our learners depend on us for personal and professional development. We are in a key position to address major organizational needs and retain workforce staff. We provide the opportunity for learners to reflect, grow, and utilize the tools we provide to solve challenges.

But sometimes, it is us, the designers, who are in need of additional development and inspiration. It is our willingness to try new approaches, to think outside the box, and to design learning with intentionality that will ultimately benefit those who depend on us.

It is our hope that these five steps will bring about a new lens on how you conceptualize your work as a learning experience designer, resulting in your learners' true impact on the world.

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NovoEd

About NovoEd
NovoEd is the leading provider of social and collaborative learning for the enterprise. NovoEd's cloud-based platform enables the creation, curation, and delivery of engaging learning experiences that enable business transformation and improve individual and organizational performance.

The company makes it possible to scale the best of in-person training online across a global workforce. NovoEd's customers include mid-size enterprises, Fortune 500 companies, and executive education providers.

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