

A Successful E-Learning Strategy for a Large U.S. Retail Organization

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Characteristics of E-learning in U.S. Corporations Today

- Lots of page-turning and simple products
- Lots of money spent on LMSs rather than training and performance improvement itself
- Generally considered unsuccessful, at least relative to expectations

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Why Hasn't Most Corporate E-learning "Worked"?

- **Upfront training courses are overused**, keeping employees "in training" too long and taxing their ability to retain information.
- **Much e-learning is of the simple-to-produce variety**: page-turning sites, Web-based PowerPoint presentations, and interactive games from off-the-shelf software.
- **Most e-learning fails to fully focus on the audience, their goals, and their work activities**. The result is bland, generic e-learning, devoid of the personality, precision, and relevance to help employees succeed on the job.
- **Non-technical people, such as trainers and subject matter experts, lack sufficient ways to create rich e-learning**. They must hire programmers to do the technical work or learn semi-technical concepts themselves.

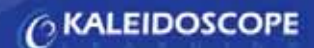
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Why Hasn't Most Corporate E-learning "Worked"?

- **Meaningful usage data**—that is, feedback to improve e-learning products, and therefore, employee job performance—is **in short supply**.
- **The goal of e-learning is generally considered to be to train people**—rather than to improve performance.
- **Return-on-Investment is typically measured based on travel savings rather than savings from improved performance**, so many projects with a likely high ROI cannot get funded.
- **Corporate e-learning has acquired a heavy technical focus**. It seems accepted that, for example, traditional instructional design expertise + Flash skills = e-learning expertise. Design, "art," and creativity seem to be ignored.

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Blueprint of a Successful E-learning Strategy

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Background

- **Client:** A major U.S. Retailer with 1500 stores (all within the U.S.)
- **Audience:** Store employees, with a focus on managers for different areas
- **Initial problems we faced:**
 - **General:** Improve performance/save money
 - **Specific:** Employees, particularly managers, had trouble finding information that was clear, current, and trusted

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Specific Client Needs

Every store had several managers, each responsible for a major area—for example, the sales floor with its merchandise displays, or the “back room” with its inventory. These managers had two primary needs:

- **Better job information:** Even experienced managers couldn't easily recall the numerous, detailed, and often changeable procedures relating to their job. Managers wanted a faster, effortless way to get this information, as well as assurances it would be current.
- **More purposeful training:** Managers asked for more engaging and job-relevant training, but only for tasks deemed critical to the daily operation of their area.

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Strategy Components (I)

The products for store managers:

- **Information-reference sites:** Rolled out gradually, one for each of the five key manager positions within the store. With well-organized, well-written reference information, these sites replaced procedures scattered across numerous paper manuals or closed existing knowledge gaps. The sites soon became the source for credible, current, just-in-time job information.
- **Soft-skills training:** Initially designed to teach coaching skills. Using our “Watch, Rate, and Compare” model, managers watched a video of someone in their role in a coaching situation; rated the coach's performance on key criteria; compared their ratings to those of experts; then saw the same scenario performed well, so they could model their own behavior.
- **Technical training:** This product taught people how to use the “Radio Frequency (RF) Units,” handheld devices needed for many daily business activities, such as keeping track of store inventory. Our learn-by-doing simulation enabled managers and their employees to practice using RF units to complete realistic, everyday job tasks.
- **Portal:** A single place to house all training and reference, with an across-all-products search.

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Strategy Components (II)

Authoring/content management tools for trainers and SMEs:

- **Authoring:** Using Encompass' intuitive authoring component, trainers and subject matter experts were able to create rich training scenarios and reference information; Encompass required no technical expertise whatsoever.
- **Internal content management:** Encompass served as the central knowledge base for the headquarters team, housing training and information. Encompass' "content reports" allowed trainers, subject matter experts, and others to review content.
- **Sensible content reuse:** Encompass allowed content to be customized and reused across different audiences; it also enabled reuse across different products, such as in a training scenario and an information page.
- **Usage data:** Encompass tracked each action users took in the product suite, but gave this information to headquarters in aggregate form, so trainers could learn how store employees were using the products.

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Results and Conclusions

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Results

Our data showed that:

- Each job position performed more efficiently, by a minimum of 5 minutes per 8-hour shift. That resulted in a savings of over \$15 million per year for the company.
- Users embraced the product suite, elevating it to the position of e-learning standard and internal company "brand."
- The suite quickly became the most-frequently-used site on the company's intranet and has maintained that position for years.

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Why This Strategy Worked

The products were "right" for their users. Each was designed for the goals and style of the audience, to help them do their work effectively and efficiently. For example:

- The first information reference product was not only searchable, but also organized by the eight high-level goals each manager had.
- The language in the information reference was clear, concise, and operational—that is, people could understand it and put it into practice.
- In the training scenarios, the situation and the dialogue were realistic.
- The technical training was designed around real-life tasks the learners would face (e.g., "You're out of Tide detergent...what do you do?") rather than on out-of-context technical steps.
- The Encompass Toolkit used by the trainers allowed authors to insert links without needing to understand the HTML behind them.

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Why This Strategy Worked

More examples of the products being “right” for their users:

- The coaching training was engaging and fun *because* the situations were realistic and interesting; the “fun” was never gratuitous or unrelated to the content and the learner’s job.
- All products were designed to be used in short bursts of time, which fit perfectly in the audiences’ fast-paced, hectic worlds.
- The learners felt emotionally connected to the products—everything from the writing style to the graphical look was designed to make the learners’ professional lives easier, and this resonated with them.

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How We Did It

- **We created the right team roles.**
 - A central group with specific expertise in e-learning conceived and built the learning and system architectures, while also leading the design and development process for each product.
 - The role of computer programmers was solely to implement the products technically.
 - Experienced writers with knowledge of the audience and training in e-learning development handled the writing tasks and worked closely with the educational designer.
- **We worked with—and held firm to our learner-centered positions with—the Internal IT Group.**
- **We focused on the audience’s needs—but used our team’s creative skills and design expertise to decide how to address those needs.**

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Major Challenges We Faced

- **Timing and budget:** The first iteration of products took longer to produce—and cost more than some other approaches—but the significant financial return and the measurable increases in employee performance and morale erased any short-term drawbacks.
- **IT and “Web structure” internal barriers:** Technical standards were often absent, changing, or conflicting. Moreover, some technical staffers did not complete their tasks on time or did them incorrectly, causing project delays or rework.
- **Subject matter expertise:** At times, it was difficult to get a clear company position on an operational issue or answers to content questions.

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Future Challenges

- **Scaling up by upgrading the staff’s skills:** Scripting training and writing reference information for online delivery is difficult, rigorous work, and most headquarters trainers today lack the background or experience required to develop effective online content on their own.
- **Work around (or fight against) unnecessary technical limitations:** IT restrictions for “consistency” and LMS restrictions can easily compromise the effectiveness of future products.

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Summary

- Corporate e-learning is not close to reaching its potential, and has gone in several wrong directions over the years.
- To right the ship, we need several things, including:
 - The right expertise
 - The right technical tools
 - A clear connection between training and business goals
- We hope our experience with a large U.S. retail company can help other companies improve the quality of their e-learning.

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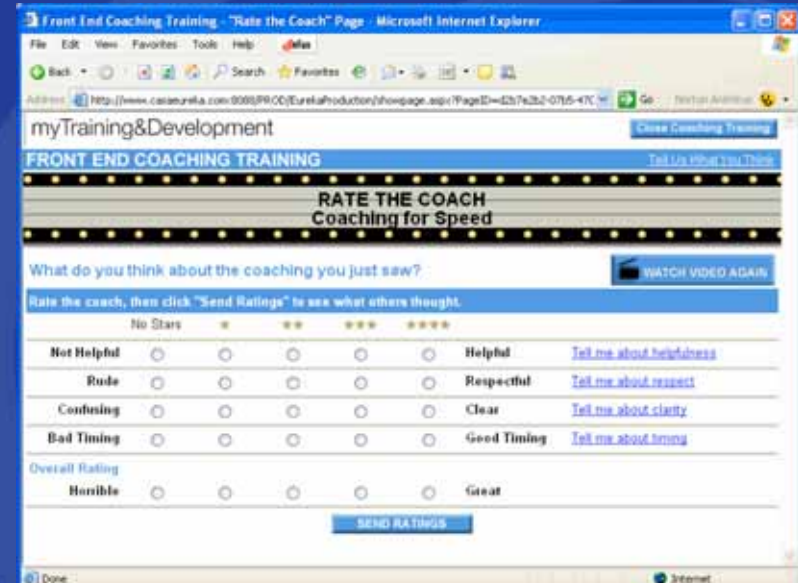


Sample Screens

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