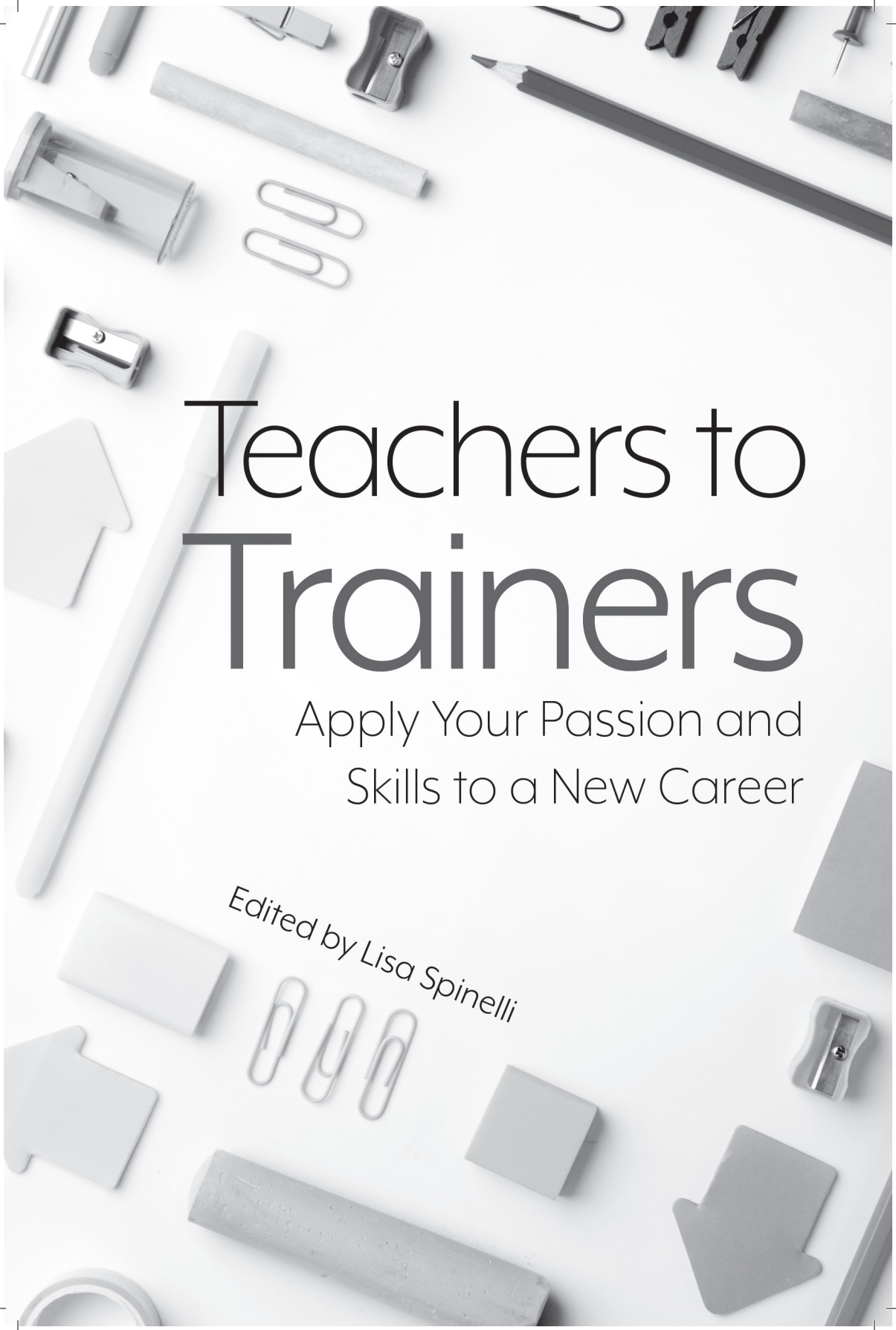


Teachers to Trainers

Apply Your Passion and Skills to a New Career

Edited by Lisa Spinelli

23 22 21 20 1 2 3 4 5

ATD Press is an internationally renowned source of insightful and practical information on talent development, training, and professional development.

ATD Press
1640 King Street
Alexandria, VA 22314 USA

Ordering information: Books published by ATD Press can be purchased by visiting ATD's website at www.td.org/books or by calling 800.628.2783 or 703.683.8100.

Library of Congress Control Number: 20209428

ISBN-10: 1-95215-714-5
ISBN-13: 978-1-95215-714-1
e-ISBN: 978-1-95215-715-8

ATD Press Editorial Staff
Director: Sarah Halgas
Manager: Melissa Jones
Community of Practice Manager, Career Development: Lisa Spinelli
Developmental Editor: Kathryn Stafford
Production Editor: Hannah Sternberg
Text Design: Shirley Raybuck
Cover Design: Shirley Raybuck

Printed by Color House Graphics, Grand Rapids, MI

Contents

Preface

Oprah Winfrey cried when she saw her fourth-grade teacher, Mary Duncan, as a surprise guest on her stage.

"I always, because of you, felt I could take on the world. You did exactly what teachers are supposed to do, they create a spark for learning that lives with you from then on," Oprah told her teacher.

"One of the defining moments of my life came in fourth grade—the year I was a student in Mrs. Duncan's class at Wharton Elementary School in Nashville," she later wrote. "For the first time, I wasn't afraid to be smart, and she often stayed after school to work with me."

Bill Gates says he, too, partly owes his success in life to his childhood teachers—particularly his fourth grade teacher and librarian, Blanche Caffiere. "When I was a student, I was lucky to have some inspiring teachers—including a wonderful librarian when I was in the fourth grade and a chemistry teacher in high school—who challenged me and brought out my best. They helped make me the person I am today" (Gates 2018).

And while you may know Bill Clinton for being the 42nd president of the United States, he's also known for his love of playing the saxophone. He credits his high school band teacher, Virgil Spurlin, with not just teaching him how to play his beloved sax, but also for mentoring him and teaching him organizational and leadership skills. Clinton was quoted in multiple media outlets as saying he has thought of Spurlin as his mentor all his life.

Exceptional teachers can be the catalyst to inspire trailblazers, thought leaders, and entrepreneurs who forever change the world. Having this kind of impact is why teachers do what they do. Nearly all of us can think back to our favorite K–12 schoolteachers and find a point at which one of them changed our perspective or touched our hearts. Yet, like any job in public service, teaching requires some give and take.

I am not a teacher, but I, too, thought that if I followed what I perceived to be a lifelong passion, I would be fulfilled. Growing up, my family moved around quite a bit. We were never in one place longer than a few years (sometimes months) before we packed up and moved again. I became very adaptable (some might say a bit nutty)—but because of this upbringing, I also get bored very quickly. Having few constants in my childhood years, I clung to books, my parents, and my brother, Paul, when he wasn't off setting things on fire.

My love for the written word led me to an English degree, then a master's degree in journalism, and ultimately a writing career. After spending about 10 years in journalism, I realized that while my passion for learning, talking to new people, and writing were realized, my extroverted personality was not a good fit for a research-heavy profession—especially with the addition of three little kids all in a row. I was bored, broke, and uninspired.

Similarly, some teachers may find that though their passion to educate young minds has been fulfilled, the drawbacks of their situations have left them bored, broke, and uninspired too. Teachers are leaving the profession more now than ever before. A passion for teaching can only take a teacher so far if they cannot live with the current realities of the profession. While this was true even before the coronavirus pandemic, the exit rate is even more pronounced now than ever before. One in five teachers announced in May 2020 that they would not return to the classroom, according to a *USA Today*/Ipsos poll. The move to online instruction, constricting already-low budgets and worries over their health, have left teachers reeling.

No amount of passion will change the predetermined pay scale for a teacher in their county or state, the temperamental parents, often unruly students, overpopulated classrooms, the move to e-learning, or standardized testing requirements that continue to dictate curriculum. Teachers today are leaving their profession at the highest rates since the Bureau

of Labor Statistics (BLS) started recording those figures. Some of the main reasons before coronavirus hit the country were pay scale, feelings of being overwhelmed and unsupported by their peers and school system, and workplace conditions—which include everything from lack of respect to the quality of the buildings and classrooms.

Moving to another school or to an administrator role like principal or assistant principal may be options for those who cannot reconcile the sometimes harsh realities of being a K–12 teacher, or for those teachers who feel unfulfilled. Other teachers leave the profession altogether to find rewarding work as lawyers or in the medical profession. But for those who are looking to take their passion for education and teaching to a different demographic—this book will show you the way.

About This Book

Teachers to Trainers: Apply Your Passion and Skills to a New Career offers a view of an entirely different education system—the corporate world of talent development. Here, former teachers recount how they made their career switch, describe their current roles, and share resources and tips. You will find out why these former teachers decided to seek a change, gain valuable insight into how they made the transition into their talent development roles, discover what they wished they had known when making the switch, and examine the obstacles they overcame as well as rewards they achieved in their transformations.

The most important element to take away from these former teachers' experiences is that their passion for helping others and reshaping lives for the better still runs strong in all of their current roles. By moving into talent development roles, you can still tap into that deeper sense of purpose and the skills you acquired in education—you just won't have to chase your students off the monkey bars.

Each chapter includes sections on job market research, what you need to go forward, transferable skills, and final thoughts on what to consider when mulling this career change. Also included to guide you are a full range of resources—websites, links, research tools such as skills assessments and worksheets, reading recommendations, and a professional resume sample. Here is a brief description of the chapters.

Introduction: Why Teachers Leave offers data on teachers leaving their profession—who they are, why they leave, and where they go.

Chapter 1. Talent Development = People Development describes the growing field of talent development, introducing the variety of roles that K–12 teachers might pursue—instructional designer, e-learning professional, trainer, coach, performance consultant, and talent development manager or director.

Chapter 2. At a Career Crossroads, Choosing Corporate Training introduces you to the diverse world of building performance capability within the corporate arena. Besides snippets of how three teachers made the transition there are myriad tips, techniques, and ideas for your journey.

Chapter 3. Instructional Design: Transform Your K–12 Skill Set is for those curious about opportunities outside teaching. A former teacher describes her journey to instructional design.

Chapter 4. The E-Learning Professional introduces you to an e-learning expert who describes how she's blended a love of computers and education to become an instructional designer focused on instructional technology and e-learning.

Chapter 5. Serving Through Coaching features a leadership coach who describes how she partners with clients and shares the many roles of coaching in the business world.

Chapter 6. Consulting and Presenting: Focus on the Big Picture shares the story of one teacher who struck out on his own after a full career in K–12. He relays the skills and drive needed to sustain a long second career as a consultant and public speaker.

Chapter 7. Academia: Higher Education's Risks and Rewards demonstrates that although career paths in higher education are fewer today, universities offer unique benefits for those who remain enthusiastic about in-classroom teaching.

Chapter 8. A Step Up: Management and Leadership shares the story of how passion is the link for one teacher-leader who became a director of learning at one of the U.S.'s largest national retail corporations.

In the **conclusion**, we consider the growing talent development field and what the future might hold for this industry.

Let *Teachers to Trainers* be your guide toward discovering the world of talent development. If you are considering a shift in your career but still love to

educate and cultivate individuals, then you have picked up the right book. You can keep your purpose and passion. You can be impactful and create a spark for learning, *and* still have the flexibility, compensation, and growth you crave in a career. Meet teachers who have done just that—transformed their careers from K–12 into the corporate world. None of them regrets it. We will inform you of the many options available, and the realities and the triumphs that come with the transition. We hope we can help in your quest!

—Lisa Spinelli, Senior Content Manager, Career Development, ATD

Introduction
Why Teachers Leave

Lisa Spinelli

These days we hear a lot about purpose and passion being the keys to career satisfaction. Steve Jobs once said, "You have to be burning with an idea, or a problem, or a wrong that you want to right. If you're not passionate enough from the start, you'll never stick it out." Soccer star Mia Hamm (1999) wrote in her book *Go for the Goal*, "If you don't love what you do, you won't do it with much conviction or passion." And Oprah Winfrey has said: "Passion is energy. Feel the power that comes from focusing on what excites you" (Ruhl 2015).

Some teachers home in on their purpose and passion very early on in their lives. For many, the inspiration struck during their elementary school days as they emulated their own teachers.

> "I had been teaching or dreaming of teaching since I was a little girl. My aunt was a kindergarten teacher at the elementary school I attended, and I would stay with her after school. She allowed me to help grade papers and put up cute bulletin boards. She even gave me her extra ditto sheets. Every Saturday morning, I would take those ditto sheets and set up 'school' in the basement for my younger brother and the neighborhood children. That is where the love of teaching first began."
>
> *—Karen Vieth, Director of Implementation Services With InSync Training and Former Third-Grade Teacher*

Vieth's story is like that of many teachers who find their passion early on. For them, teaching is not just a career choice—it's a calling. Whether it's teaching neighborhood friends, siblings, or stuffed animals, these pint-sized instructors feel an innate need to coach, guide, and instruct others. The desire to teach only gets stronger the older they become, and once they're in college, they know exactly what they want to do for the rest of their career—be a teacher.

Once out of college, potentially with some mounting student loans, these educated teachers don't usually have a tough time finding a first-time job in the public school system. However, about 44 percent of all new teachers will leave the system within five years, according to a 2017 University of Pennsylvania study (Ingersoll 2018). The current overall exit rate of K–12 teachers and other public education employees even before COVID-19 was the highest reported since the Department of Labor began collecting such data in 2001, at about an 8 percent attrition rate, nearly double that of countries like Finland and Singapore (Strauss 2017). Research sources pose different reasons for why teachers are leaving their jobs, but pretty much all sources agree the biggest culprits are the pay rate or salary, lack of support from their school system and peers, and workplace conditions. Not surprising, the exit rate (those leaving the profession entirely or switching schools) of the teachers in the lowest paying school systems—those in Title I schools—was nearly 50 percent greater than those in non-Title I schools. Of those leaving the school system between the first and fifth year, many cited a lack of peer support and mentoring while taking on the challenges of the teaching profession as their top reason for leaving.

Looking at the average salary of a teacher, one might think it rose in the last two years, but when you adjust for inflation (at the average 2 percent) it has actually gone down by $370. In some states, like Oklahoma, teachers are paid less than gas station attendants (Hess 2018). The blame falls, ultimately, to state- and federal-level governments that have implemented teacher salary freezes and budget sequestration while the cost of living continues to climb.

Couple this with the increased expenses that teachers pay out of pocket to maintain their classrooms and their health insurance and you can see why the rate of departure for this honorable profession is increasing. The average teacher spends more than $400 in school supplies for their classroom per

year, including necessities such as paper towels and hand sanitizer, and even, in some states, computers and ink cartridges. States simply have not appropriated the funding needed to keep all their classrooms supplied with the necessary items.

For a public worker's salary, affording skyrocketing healthcare costs is doubly painful. Some teachers pay upward of 16 percent of their income on health insurance costs. The high cost of health insurance and classroom supplies, along with the average rise in cost of living, does not correlate to the salary increases, leaving many teachers in an unsustainable financial situation for decades.

> "I truly loved my job, but I knew I wasn't going to make any real money for decades. With my own family to worry about, I wasn't willing to live—and make my family live—like a pauper for that long."
>
> *—Scott Pitts, Training Development Manager at Centene Corporation and Former High School History Teacher*

In just 24 months, from 2018 to 2019, there were at least 17 teacher strikes in West Virginia, Oklahoma, California, Arizona, and Colorado. The biggest reason for these strikes: low pay. Half of all public school teachers have seriously considered leaving the profession in the last few years, according to a 2019 PDK International poll, because of low pay and their underfunded school environments. More than half of all the K–12 teachers in the country are not satisfied with their income level, which negatively affects their overall view of all the aspects of their job—they have increased stress levels, are quicker to leave the profession, have lower levels of motivation, and experience increased incidences of mental health issues like panic attacks and depression.

I have not seen a news report, nor talked to one teacher, saying that teachers leave because they lost their passion to educate young minds. But sometimes passion is not enough. Sometimes, our passions don't match our lifestyle goals and our bills eat our passions for breakfast. No matter how much passion a schoolteacher may have, there are some elements to the profession—like the pay scale—that are not going to change.

> "I felt like a failure; I couldn't bring [my] illiterate 11th graders fully up to [the] reading and writing standards that they missed out on in

the past 10 years of school, and I struggled to make a difference for each individual, because I was overwhelmed with large class sizes, various grade levels together, and my own struggles as a new teacher. I felt stretched to my limits."

—Hillarie Hunt, Director of Learning and Development at the Northwest Evaluation Association and former English, Music, and Drama Teacher

Being a teacher demands a practice in emotional intelligence and patience every day. Misinformation is out there among parents and the public on how much teachers actually work outside classroom hours.

"Anyone who has been a teacher knows what it feels like when someone says, 'It must be nice to have summers off.' At that time, I felt so little respect for the profession of education, while I was also experiencing first-hand what it was like to be a teacher and put so much of my heart and soul into caring for my young students."

—Carla Torgerson, Instructional Design Consultant and Former Elementary School Teacher

The rate of public distrust and lost confidence in public school teachers is also at an all-time high. Of those 1,042 adults surveyed in a 2018 PDK International Poll of the Public's Attitudes Toward the Public Schools, 39 percent did not trust or have confidence in public school teachers, up from 27 percent in 2010. Feeling and hearing this lack of respect and appreciation can become draining for teachers. Whether they felt a calling or not, by their fifth year in the career, half of all K–12 teachers will transfer to a different school or leave the profession altogether.

Next Steps

There are a great many books on finding your career fit and purpose, so I won't turn this book into one of them. But if you are ready to leave teaching, the biggest indicator will be your gut. In this day and age, your internal feelings are often suppressed to make way for the entirely well-thought-out and over-analyzed next steps. Sometimes you just need to take a leap of faith.

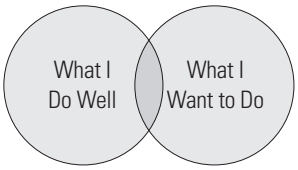
I didn't really believe people when they said, "If you love what you do, you won't feel like you're working another day in your life." But then I found my current job. And while that's maybe not entirely how I feel every day, I have found that I do love what I do. In essence is has always boiled down to a couple elements—what I do well and what I like to do.

> "My ethic is that if the student was not engaged, then the learning wouldn't matter that much. In my credential program, we learned about individual education plans, Vygotsky's zone of proximal development, and Multiple Intelligences. I had studied differentiated instruction but found that in practice, the typical school curriculum was structured for three populations: core curriculum for the mainstream, supports for struggling students, and extensions for the advanced. That wasn't enough to meet my requirements for an engaging model. I adopted personalized learning as a necessary component and proceeded to offer individual learning contracts to my students. About a third of them got it and took me up on it, a third were already conditioned to worksheets, and the last third—my favorites—were passive aggressive or hostile. In their gut, they knew they weren't getting what they needed to thrive but could not articulate their objections. Turning these kids around was my special challenge."
>
> *—Michael Freedman, Founder and CEO of Practical Academics and Former Teacher*

Michael was in operational management for 20 years in the tech industry until he gave it all up to pursue his lifelong passion for teaching. It didn't take him long to become frustrated with the system and bureaucracy of public school teaching, though. He left the school system to combine what he did well—operational management—with what he wanted to do: help foster lifelong learning. He was able to mix in the skill set from his previous experiences in the technology world and public school system to create an online learning platform for adults called Practical Academics.

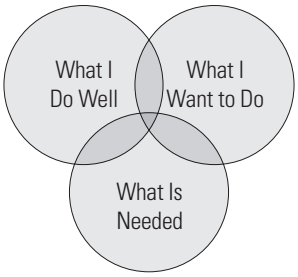
His advice for finding a new career path comes in the shape of a Venn diagram (Figure I-1).

Figure I-1. Step 1 of Finding a New Career Path



When you've finished that layer, add one more (Figure I-2).

Figure I-2. Step 2 of Finding a New Career Path



Try this exercise out for yourself and see what you come up with in the intersections. It can focus you not only on what you are good at, but also on those things that you enjoy doing, while pursuing pathways to viable career opportunities. What are your current skills and how can they transfer to an optimal next career path? A good number of your teaching and education skills are applicable to talent development positions.

Summary

If you identify with any of the reasons we've discussed in this chapter for leaving your teaching position, you might be ready to take that next step toward finding a new career path—and talent development might be the right path for you. This book offers a number of roles, pathways, and suggested assessments for you to explore. Keep reading to see what the future of work in the field of talent development—the "what is needed" bubble—looks like today.

Chapter 1
Talent Development = People Development

Lisa Spinelli

"I love working with the smartest and most passionate colleagues," says Hillarie Hunt, director of learning and development at Northwest Evaluation Association. "Everyone at my work is very mission-driven, and so good at what they do. It is inspiring!"

Hillarie was a public high school teacher of English, music, and theater for five years. In that time, she experienced innumerable moments of frustration. She taught remedial reading and writing to 11th graders who were afraid to attempt to write their name at the top of a blank piece of paper, yet she had to prepare them for graduation the next year. She often had no classroom of her own, so she pushed a large cart of teaching materials from classroom to classroom just to have a space in which to instruct. Older boys in her class arrived at her doorstep during the night to ask her out on dates, and she had little support from her administrative staff. "I felt stretched to my limits, and responsible for everything; but I couldn't be teacher and social worker, and parent, and psychologist, and entertainer, and doctor, and crowd controller, and babysitter, and counsellor to so many kids."

Frustrated, she quit and moved out of state to take a position at a computer learning center. She started tutoring adults on computer applications like Advanced Word and Windows 95 and soon found that it allowed her to do the thing she loved the most: teach.

Sadly, Hillarie's story is similar to many K–12 teachers. Instead of being able to develop her students' young minds and spend the majority of her time coming up with lesson plans, she got stuck wearing too many hats and navigating a toxic work environment. Moving into a more amicable work culture, Hillarie was able to refocus her education skills and start developing her learners.

What Is Talent Development?

"Talent development is people development," ATD's CEO Tony Bingham wrote in 2014. The official definition of talent development (TD) from ATD is "the efforts that foster learning and employee development to drive organizational performance, productivity, and operational results."

Talent development professionals help train and increase the skill level or performance of employees to drive company success. An example could be software training for the organization's new human resources software, or compliance training to update the team on a new law that affects the way the organization reports accidents on the job.

Or the training could be developing a program, as in designing a whole new way in which people work or onboard into the company. Sometimes classified as organization development (OD) professionals, these types of TD pros are asked to develop programs across the entire organization to increase employee retention, engagement, and growth. The type of programs OD professionals develop could be for any level of employee, from leadership and managers to entry level. OD professionals create programs for everything from management to emotional intelligence and flexible work environments to succession planning.

Almost all talent development professionals, no matter what their role ultimately is, are usually found within an organization's human resources department. Some of the potential job titles covered in this book are:

- trainer
- instructional designer
- e-learning professional
- leadership coach
- professor
- performance consultant
- talent development manager.

Think about the different areas of your life: your breakfast foods, coffee, car, clothing—for every aspect of your life, there was a trainer who taught someone how to produce that good or service, and someone who helped that worker develop their career as well. Your breakfast cereal was made by a series of people and machines operated by workers who were taught how to use those machines. Your coffee was served to you by a barista who was trained on how to use the espresso machine and completed food sanitation compliance training. Your car was serviced by a mechanic who was trained at the shop, probably by another mechanic or subject matter expert. For every good and service you will find a trainer, instructional designer, or other TD professional involved.

Skills and Capabilities Needed

> "People try to find other ways out of teaching. For me, it was all about taking the skill set I had but also trying to help other people—even teaching hiring mangers how I could cross over. . . . I first went to an agency and they were not very optimistic about how I could transfer my skills. They said I was only going to make this much money and start at the bottom. There are a lot of misconceptions about what teachers can bring to a corporate environment.
>
> "I think about companies' understanding of teachers in transition and trying to understand what those people's skill sets are. Veterans have the same thing—people don't understand what skill sets they have to offer—these people are out there conducting missions and translating and they have all the skills you have to have in a corporate environment, but sometimes we get pigeonholed into roles—teachers and soldiers."
>
> *—Karen Bieger, Global Product Developer at Lee Hecht Harrison and Former Elementary and Middle School Teacher*

You may not realize that you already have the skills, education, and experience to become a talent development professional. The move from teaching to training and development is not so much a giant leap as a lateral step. While you may need a certification or two, a few more projects in your portfolio, or a couple new experiences, a lot of what you have done in K–12 teaching is applicable and just needs to be translated into corporate-speak.

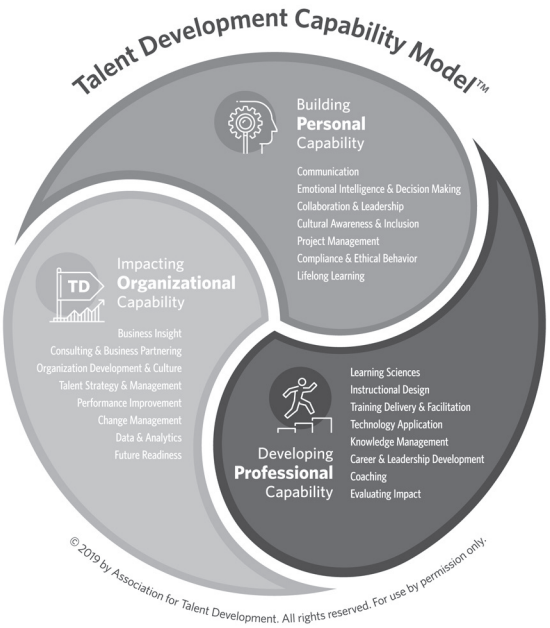
Much like K–12 teaching, the TD field includes the practice of designing lesson plans and curriculums; training students; and creating, evaluating, and managing new projects and programs. At the root of these skills are a set of capabilities mapped out using research conducted by ATD and the Human Resources Research Organization (HumRRO).

The ATD Talent Development Capability Model (Figure 1-1) focuses on 23 capabilities within three domains:

- interpersonal skills
- professional skills
- organizational skills.

Let's walk through a list of talent development skills matched to teacher skills and experience.

Figure 1-1. ATD Talent Development Capability Model



Professional

This domain of practice embodies the knowledge and skills talent development professionals should possess to be effective in their roles of creating the

processes, systems, and frameworks that foster learning, maximize individual performance, and develop the capacity and potential of employees.

- **Learning Sciences:** the way in which your class learns, absorbs, and retains information
- **Instructional Design:** lesson planning and writing curriculum and assessments
- **Training Delivery:** daily classroom facilitation of lesson or "teaching the class"
- **Technology Selection & Implementation:** you may not have had much control over this in the past, but could include things like adding a smartboard or using Google Classroom or Blackboard for online instruction
- **Knowledge Management:** working with district-level administrators on the annual curriculum for a specific content area
- **Career & Leadership Development:** setting a good example for students and helping instill lifelong leadership lessons for students; also included here is your own career development through continuing education credits and teacher workdays
- **Coaching:** identifying and coaching students to be classroom leaders and coaching other teachers in best practices
- **Evaluating Impact:** assessing, grading, and evaluating your lesson plans and student retention

Personal

This domain of practice embodies the foundational abilities all working professionals should possess. Often called soft skills, they are needed to build effective organizational or team culture, trust, and engagement.

- **Communications:** your tone, mannerisms, and the way in which you talk and present to the class as well as your peers and administration
- **Emotional Intelligence & Decision Making:** having control over your emotions and making sound decisions for each student, as well as the class as a whole
- **Collaboration & Leadership:** you may not be able to collaborate with other teachers as much as you would like, but you are a leader in the classroom and use collaboration skills online to help come up with new ideas and projects all the time

- **Cultural Awareness & Inclusion:** you likely include learners from all walks of life in your classrooms
- **Project Management:** creating both short- and long-term projects for your class and keeping them and yourself on track
- **Compliance & Ethical Behavior:** you follow strict ethical guidelines and adhere to them every day
- **Lifelong Learning:** you continue to instill in your students a love of lifelong learning and do it for yourself as well to keep on top of education trends and keep your certification up-to-date

Organizational

The biggest area you likely need to address is your organizational capability. The setting of a business organization is very different from a school. While most schools have a business objective of creating good citizens for the community and country as well as producing students with high test scores, organizations have widely varying and interactive goals. Even in this foreign territory, however, teachers will find some overlap of their own skills and capabilities:

- **Performance Improvement:** creating and adjusting classroom and student goals for semester and annual plans to show continual growth
- **Change Management:** working with unexpected schedule or policy changes that may affect the lesson or school day, and gaining support from students and other teachers
- **Talent Strategy & Management:** managing the department team lead, lead teacher, or instructional coach
- **Data & Analytics:** reviewing test scores and assessments to see where your students are and finding the holes in their knowledge
- **Future Readiness:** for yourself, this can mean all those education conferences and classes you take to keep up with technology and trends, or reading Education Week and other trade publications. For your students, it means preparing them for the future workforce—which you do every day in every way by teaching them how to interact with others and learn new skills and technology.

As you can see, there are a number of transferable skills and capabilities that teachers can bring to a job in talent development. Take the free interactive ATD Talent Development Capability Model self-assessment at TD.org to see what areas you need to work on most going forward.

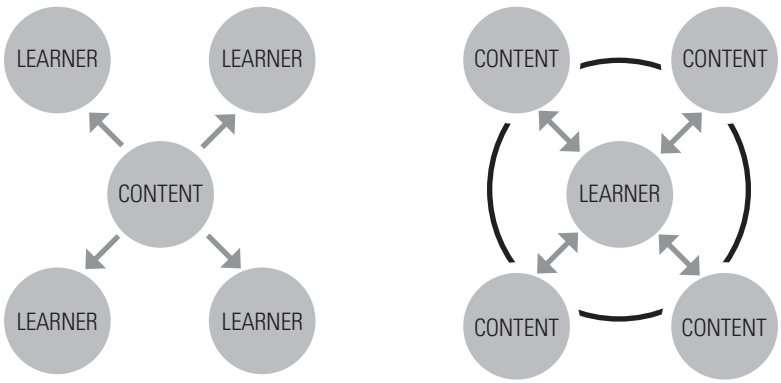
Teaching Versus Training

One of the biggest differences between teaching and training is the way knowledge is transferred. While K–12 teaching usually works under the pedagogy method, adult education uses the andragogy method.

"You can find out so much by researching the new methods out there," says Karen Bieger. "Bloom's Taxonomy . . . is one method you have used and it's definitely what the instructional designers use as well."

Teachers are used to essentially being the experts in the room imparting their wisdom and knowledge to their students, and while there is a back-and-forth interaction between the teacher and children, trainers have a more symbiotic relationship with adult learners, since adult learners can pull from a larger well of experiences. While K–12 material is usually delivered in a linear method, adult learners tend to be more self-directed and use their vast life skills and experiences to help guide their learning. This andragogy style of teaching is ingrained in all talent development professions (Figure 1-2).

Figure 1-2. Pedagogy vs. Andragogy



American adult educator Malcolm Knowles' theory on andragogy has five main assumptions:

- **Change in self-concept:** Adults self-direct their learning and don't appreciate being directed by an instructor as if they are children.
- **The role of experience:** Adults are themselves a rich resource of experience and lessons and so learn from their experiences.
- **Readiness to learn:** As adults grow, they are less likely to want to learn tasks and skills that don't apply to their careers or life.
- **Orientation to learning:** Children are subject-matter learners while adults are problem-style learners.
- **Motivation:** Children are driven by external motivators, while adults are more internally motivated.

Workplace Settings

"The first role I had outside teaching was not all training. It was being a program manager for an aquarium and writing curriculum. It was still for children—some adults, too, but mostly kids on field trips," recalls Bieger. "I was in there creating content, and it's very different than the academic content, and different than the corporate content I'm doing now. But it's all an advantage for me, because I now understand it doesn't matter what I'm teaching—my job is to take whatever the content is—and I've done it on everything from sharks to turtles, in schools and at a higher level, including HVAC training, the judicial system, healthcare, and electronics—but no matter what the content is you have to do the same things; you have to research, call on subject matter experts, and organize the content. Whether it's HVAC or soft skills, it's all content and it goes back to the skill sets as a teacher—understand it, map it, chunk it. It's all about understanding how learners take in information, and that's your job."

When you consider that training happens everywhere, the setting for your training and development career can be in nearly any industry or any type of company. I was once at a health nonprofit where there were only 10 people on staff, one of whom was a chief learning officer. Some larger organizations might have no talent development professionals, while others might have 10. The structure and the size of the organization can really vary. There are some fundamental differences, however, between working for K–12 schools and working outside those classrooms.

"It is refreshing to have some collaboration to put learning materials together now," says Bieger. "We work with people all over the world, so the work I do is being sold everywhere."

In a classroom setting, for the most part you are working as the lone adult in the room; with your students in front of you most of the day, you're unable to jump on a computer. Your hours as a teacher are set; your lunch hour is set; your calendar is set for the year; your promotion schedule is set for the length of your career. When you are not working in the classroom, you are developing your curriculum or working on student projects or grading homework and papers and much more.

In an organizational setting, you will likely have much more flexibility, including your hours, lunchtime, and calendar. You will likely be tied to a computer most days developing learning or working on software systems like Captivate or Articulate. And, unless you are working in the government, your promotions will be set by proving your value and contributions to the organization rather than awarded solely on time spent there—and they could be significantly larger than those you receive at a school.

There is a lot more freedom when you move into talent development—freedom of organization size, industry, culture, hierarchical structure, and benefits packages. There are also teams that are highly collaborative and innovative, while others are not. Finding out the type of workplace setting in which you thrive might take a little trial and error.

Weighing Benefits and Challenges

Creative expression is a big reason some teachers move into adult education. Being allowed to think outside the box and use creative solutions in their projects can be new to teachers who were previously stifled by stricter curriculum mandates.

"I love being able to use my creativity," says Matt Sustaita, former special education teacher turned instructional designer for software developer company Workday. "I get to address performance issues with best practices and get learners engaged in cool and interesting ways. It's fun to develop graphics and keep them motivated and engaged. It's interesting but also challenging."

One of the biggest reasons for the switch over to talent development is because these professionals are making a very livable salary. With time, TD professionals can work their way to become six-figure-salaried, highly respected members of top-tier organizations—all without leaving the education field. According to the ATD Salary Survey from 2019, 42 percent of those surveyed were making a median base salary of $90,000 and above. Most survey respondents were responsible for instructional design and delivering training, 23 and 21 percent respectively. And this field is generally growing at 10 percent year over year—a higher rate than the national average job growth rate, which means there is no shortage of job openings across the country.

Of course, there are a number of challenges to being in the talent development field as well. No position is without obstacles. Some of the same challenges that a teacher experiences in the school system setting can also be found in training. And teaching a room full of adults a concept as dry as compliance is not going to give you the same full-body fulfillment as helping a child read for the first time or helping them discover that space and time are continuous. For all the pluses of the talent development field, there are certainly a few drawbacks as well.

Many talent development professionals will note they don't feel like they have a seat at the boardroom table or the ear of their CEO; many feel the challenge of getting adults learners to be engaged during a mandatory class; trainers often complain about disruptive or difficult learners in the room—and it can be potentially more challenging to deal with a disruptive adult than a child you can send to the principal's office. Oftentimes TD managers experience feelings of being overworked and many believe they don't have enough resources to complete all the tasks they are given. If you are a teacher, this may sound very familiar.

Summary

We want to paint an honest picture for you. Talent development can have many rewards and triumphs, but there are also challenges. In the next few chapters, you will see both the challenges and the triumphs that teachers who have moved into the field experience. You will also learn what some of these teachers wish they had done differently. In the end, talent

development is all about people—developing and teaching people to be better at their jobs, finding a better fit for their skills, and continuously learning new skills or upskilling. If this sounds exciting to you and like something you want to explore, keep reading.

Chapter 2

At a Career Crossroads, Choosing Corporate Training

MJ Hall

What do you do when you realize you are at a point where your teaching career needs to change and you want to go in a different direction? What are the options? What choices do you have? What are the tradeoffs? What are the consequences for the choice you make?

One former teacher told me, "My career—both as a teacher and an administrator—was just not working for whatever reason. I was just dissatisfied. I was miserable. My thoughts were continually turning to 'there has got to be something else.'"

Another former teacher recalled the moment he started to think about another career: "There I was driving away from the hospital with our second baby in the backseat. As my wife and I talked about how this new lifestyle was to evolve we made the decision that she would be a full-time mother. To afford this change, I took a second job to supplement my teacher pay and to cover the summer months. After a few years, I realized I was never at home and was missing the opportunities to see my children grow up. Something had to change."

As for me, there was a moment when I realized my teaching life was about to change too. I was getting married to a career military officer, and I

would no longer have control over where I lived or how long I lived there. I wanted a career, but given the military lifestyle, teaching in one system and gaining tenure with opportunities for other roles in the organization was no longer an option.

The three of us took different paths as we left teaching—one jumped the K–12 ship and landed in the banking industry, working his way into the L&D department; another started a side hustle while continuing on in the K–12 field and was able to move into talent development after building a client base. I was able to move from teaching middle school for the Department of Defense into the federal competitive service, which opened up a variety of roles for me before I landed as a professor at the Defense Acquisition University (DAU). Despite our different journeys, we all found the way to corporate training and the field of talent development.

What Is a Corporate Trainer? What Do They Do?

A corporate trainer can serve in a variety of roles within an organization, all of which are aimed at creating environments for employees to build capability that supports the business strategy, delivers the operational results needed for the business to stay competitive within their unique market, and increases the overall capacity of the enterprise. This can include skilling, reskilling, and upskilling employees.

The term *trainer* is one of many titles that organizations have for a variety of roles under the rubric of talent. Some of the related titles you may see for corporate trainers are:

- Trainer or facilitator
- Learning experience manager
- Training and educational specialist
- Sales training specialist
- Instructional designer
- Learning strategist
- Learning and development coordinator.

A recent review of an ATD Forum member lab conference for senior talent professionals revealed an array of functional areas, such as capability development, learning and development, global learning, organization and professional development, talent development, performance development, instructional systems, customer solutions readiness, and talent operations.

An appropriate response to the question of "What is a corporate trainer?" is, "It depends!" What a "trainer" does in an organization depends on the industry, the size, the reporting structure, where they are located within the organization, the geographical location of the company, and their individual skill set. It also depends on the role assigned. There are numerous roles that fit under what someone would traditionally call the training umbrella.

Ultimately, the term trainer refers to a person who creates an environment for employees to build their performance capabilities. This work includes any aspect of assessing needs and designing and implementing learning solutions. The facilitation (or delivery) can be done face-to-face, via live virtual instruction, or recorded and played back later. No matter what the delivery channel, the trainer is still responsible for teaching and supporting the transfer of knowledge much in the same way a classroom teacher does.

The Roles and Models

> "Coming from being an educator, one of the skills I already had in place was knowing Bloom's Taxonomy. This is one method you have used, and it's definitely what all the instructional designers use. You know how to write out learning objectives, even if it seems basic. Every time you wrote out a lesson plan, a lot of people don't think about it—but you need learning objectives."
>
> —*Karen Bierger, Global Product Developer at Lee Hecht Harrison and Former Elementary and Middle School Teacher*

As the tasks and responsibilities of a corporate trainer are unique to the situation and demographics, they are also based on the overarching goals and objectives of the organization. Typical jobs tasks include:

- assessing the general and performance needs of staff at the organizational, team, and individual levels
- developing a variety of strategies, plans, and tactics to help close performance gaps related to business goals
- designing learning experiences using a variety of modalities
- developing or curating appropriate materials, resources, and content
- assessing and implementing the most effective delivery modes, including staying abreast of emerging technologies, tools, and techniques

- determining the impact of the processes by measuring and evaluating their effectiveness and efficiency using a variety of data analytics.

Learning happens in many ways. Jane Hart divides these into the four Ds: didactics, doing, discovery, and discourse. In the current environment, we talk about learning as a journey, and there are a huge number of options for learning solutions. These range from formal learning to rotational assignments. Many organizations capture these under the 70-20-10 framework: the 70 represents learning from on-the-job experiences; the 20 represents social engagement—for example, learning from others or with coaches; and the 10 represents formal learning, which can take many forms. You will learn about this and many more models in the chapters to come.

> "The hardest part about leaving teaching was leaving the kids. You pour your heart and soul into these kids and they're full of energy. I loved teaching high school. One of the other hardest parts of the transition was learning the business side of training. I don't like thinking about business. I am not a business man—but if you are in organizational learning, you have to think about the business; worrying about margins and ROI, ROA, and stock price and its impacts is very tough for me."
>
> *—Scott Pitts, Learning and Development Manager at Weise USA and Former High School History Teacher*

My Story

I attended High Point University (HPU) as an undergraduate and majored in elementary education, receiving a bachelor of arts in teaching. Even at that time, HPU was known as one of the best colleges in the nation for teacher preparation primarily because of the leadership of Dr. Dennis H. Cooke. The curriculum was rigorous, requiring a dissertation-quality senior paper and completion of the graduate record exam. One differentiator for education majors was that our content discipline was teaching based on learning theory, psychology, and science, rather than a discipline like English, history, or math.

Interested in exploring new areas and with degree in hand, I moved to Montgomery County, Maryland—at the time the number 1 school district in the U.S.—and taught in a combination fourth through sixth grade setting. Their approach to education was forward-thinking and innovative,

with children grouped by skill level for basic courses like reading and math and grade-appropriate project-based learning for science and social studies. During this time I completed a master's of education at University of Maryland College Park. The program was designed to train teachers to serve as administrative liaisons between the school, the parents, and other community service entities supporting children.

I later taught with the Department of Defense Dependent Schools (DoDDS) for three years; the first two years were in Germany teaching sixth grade, and the third year was in Korea teaching fifth. While I enjoyed teaching and the opportunities for traveling, the job was very social, with large numbers of young adults my age, including other teachers, civilian employees, and military personnel. For many of the teachers this was a permanent lifestyle.

I left the DoD School System not to leave teaching but to marry a military officer. However, I still wanted a career and I realized that it would have to both fit my skills and a military lifestyle that requires frequent moves. A teaching career based on tenure and staying in a local system would not work. During my time in Germany various friends were "DoD civilians" and I learned about career programs within the federal government.

Entering the government's "competitive service" was not easy—again because I was no longer able to control my destiny. However, I was very lucky and even though I started at the GS-2 level in an administrative role, because of my seniority, education, and teaching tenure within the federal system I was able to jump levels on the GS ladder rather than moving sequentially. As my husband and I relocated from one military post to another, various opportunities surfaced, including earning an MBA and a PhD.

There is an old saying that probably sums up my career: You can take the teacher out of the classroom, but you can't take the classroom out of the teacher. I have had a varied and extensive career path with many zigs and zags—but the roles I have played in every position are teacher, learning strategist, coach, and people developer.

Because I had a teaching background, an adventuresome spirit, and curiosity, I was constantly asked to design learning experiences for various groups outside my division. These ranged from customer service workshops to diversity training and team problem-solving sessions.

My last position with DoD was at the DAU. During my 16 years there, I served as a professor for various courses, predominantly the Flagship Program Manager's course, and obtained Level IV certification in the acquisition corps. I also served as special assistant to the commandant assisting with the design of the strategic planning off-sites and as an examiner for the Baldrige Quality Program. Additionally, I participated in an exchange program serving as an executive consultant to other federal agencies. Upon returning to DAU, I served as the director of leadership development, and in this role served as the primary representative to the ATD Forum. This broad range of roles and responsibilities provided many opportunities to expand my personal capabilities, especially under the corporate training umbrella.

What You Need to Go Forward

In the current dynamic business environment, corporate trainers, most of whom serve as business learning advisors, need skills in a variety of areas—and these areas change rapidly. For most organizations these skills are not limited to the capabilities associated with our professional role in training, learning, and talent but also include foundational personal skills related to leadership, problem solving, decision making, and emotional intelligence. Additionally, more and more talent roles require business or organizational skills, such as change management. These skills can be gained from academic degrees and courses, workshops, certifications, and other credentials. Some courses that benefited me included the PMP certification from the Project Management Institute and topical ones for various leadership programs and assessment tools. Here are some of the key areas where you will have to develop your skills.

Purpose and Alignment

Businesses are looking for results to strategic goals and objectives. While training is critical, realistically, training is a support process to enable performance that contributes to the organizational outputs and outcomes. For the organization it is not about the training per se, it is about the value or return the training yields as shown in behavioral performance. In most organizations, learning processes and programs are intentionally focused to align and integrate with the business strategy. While you may be designing, developing, or providing experiences on topics such as sales readiness or leadership, the language used

and the samples and scenarios given are based on the unique business sector you are in and the culture of the enterprise. So if the organization incorporates Lean, Agile, or Six Sigma approaches, the language and tools used with that approach need be incorporated in the learning function. Additionally, while the efficiency and effectiveness of the learning processes are important, measures of success focus on the business goals and include increases in sales performance, growth, and customer satisfaction.

Business Acumen

When training happens, context is important. Since learning is a means to an end, not the end in itself, you must know how the organization works. You must understand and articulate how what you do affects the people, the business, and the bottom line. This requires understanding how your company creates value for customers including business performance measures and consistently using the language of the business.

Management Support

In organizations, learning experiences designed and provided by the training or talent function are only part of the puzzle. Before and after training, the manager's role is critical. As research by Broad and Newsom (1992) revealed many years ago, preparation for the learning experience, transfer, and sustainment of the acquired skills or knowledge provided by trainers is the largest part of the puzzle for building organizational capacity, encouraging retention, changing behaviors, and seeing application on the job. Corporate trainers must not only help the employee participating in learning, they must also coach and support managers in the role they play helping staff translate new skills and knowledge into behaviors on the job that deliver business goals.

Strategic and Critical Thinking

Instead of focusing on what is happening now, one must consider a future state and the in-between situation. This approach requires analysis, especially of the gaps, planning, and how all the pieces of the puzzle fit together. Critical thinking is fact based and requires analyses, synthesis, and evaluation of options. It means coherently explaining the rationale for a decision or solution.

Learning Ecosystem

In the corporate arena, you are expected to be an expert in your niche, because learning is a major contributor to the behaviors and actions that result in excellent performance on the job. Learning is our expertise and our foundation. It is where we have deep knowledge, a variety of experiences, and a proven track record of results. Training and learning itself is a very broad functional area, including design, development, delivery, and evaluating and measuring outcomes. But the focus goes beyond the individual learner and their skills to include the larger learning ecosystem, which includes identifying and assessing skills, increasing engagement, and developing career frameworks and pathways at the team and organizational levels.

Leveraging Learning Innovation in Technology

Learning is changing in many ways. Research findings in the science of learning have affected all learning—whether K–12 or corporate. Emerging technologies such as virtual reality, artificial intelligence, machine learning, and robotics are also playing roles in the new learning space. Learning is leveraged more and more via these technologies—and these technologies are changing constantly. Learning in the workflow and technologies such as mobile and social media have changed our dependency on the classroom. Learning in the moment of need has changed how we design, resulting in a functional niche for both performance support and microlearning. And the ability of artificial intelligence to personalize learning has placed a premium on creating opportunities for employees to learn using the specific modalities they prefer. This enables them to be more self-reliant, to have the confidence in their choices and decisions, and be more self-directed in their learning.

Transferable Skills

> "Tapping into teaching skills while in the training room, I found it easier than I thought. Some of the competencies are harder in corporate learning spaces than in a K–12 classroom, and some are easier. In a corporate setting, not academy, it's just easier to do training delivery than the academy. Reason is that teaching high school history, there's a pretty big swath of motivation in the room, some kids hate history, some love it, some are just in school because

they have to be. That's a much different environment than corporate America, where with formal events like going to class, you're certainly going to have some participants that don't want to be there—but the organization is at least paying them to be there! So there's a lot more motivation in the audience."

—*Scott Pitts*

Numerous skills that you developed in the K–12 classroom are transferable to corporate training. However, many classroom teachers do not realize they have these skills either because the terms are different in corporate training or they just did not realize they were using these skills. Some of these include:

- **Leadership skills:** Include the ability to influence and persuade, to be adaptable, to collaborate with others, and to motivate and inspire others.
- **Interpersonal communication skills:** Include dialogue and conversation, deep listening, understanding body language, storytelling, and written documentation.
- **Analytical and critical thinking skills:** Actively and skillfully conceptualizing, applying, analyzing, synthesizing, or evaluating information; applying logical reasoning; and using data-based pros and cons rather than emotions.
- **Curation skills:** A new motto for talent developers is "Curate before you create." Collecting content that is available and repackaging for consumption is part of personalizing learning experiences and is made easier by the proliferation of online content and sourced content from vendors.
- **Problem-solving skills:** Having a very large toolkit including the Plan-Do-Study-Act model (the Shewhart cycle) that is used in many school systems is a major credential; solving complex conundrums is the norm for the current workforce.
- **General management and project management skills:** Include planning, organizing, controlling, budgeting, resourcing, and executing tasks on time.
- **Digital literacy:** Fluency with platforms such as the Microsoft suite, Zoom, social media, and apps that access and share data is a necessity,

especially with the growth of remote workers. So is an awareness of learning management systems including aggregators, and an understanding the effects of emerging technologies such as virtual reality and artificial intelligence.

- **Creativity:** Innovation is part of the corporate training territory. You should nurture wonderment using design thinking methods and other concepts to promote innovation
- **Growth mindset:** This includes being curious and chasing that curiosity with self-directed learning, reflection, and feedback; being open to new ideas and possibilities and taking risks; and learning from mistakes.
- **Learning about learning:** Being an active and continuous learner and understanding metacognition and peak learning techniques.
- **Judgment and decision-making skills:** Being able to articulate how you make decisions and recognizing the broader perspectives within the ecosystem and the consequences of the actions taken. The talent development field is awash with new tools and techniques; you should be able to make distinctions between the tools that are best for the situation and the shiny objects.
- **Grit:** Includes discipline and determination, acting on priorities rather than firefighting, and time management.

The Future of the Field

Technology disruptions, especially advances in artificial intelligence, automation, robotics, and virtual reality, are changing the way work is done—therefore changing the learning landscape. While this has implications for eliminating many jobs, some of which are fairly routine, much of the work associated with constructing learning environments is creative. This bodes well for the role of corporate trainers. After all, someone will have to teach others how to work alongside these new pieces of technology!

Various organizations research, track, and publish information on the future of corporate training trends. While many are corporate training vendors, others—especially major consulting firms like Accenture, Deloitte, and McKinsey—have information that is published and on their websites. LinkedIn also tracks and publishes trends, such as the *2019 Workplace Learning Report.*

Serving as a corporate classroom instructor used to mean teaching a group you may or may not know much about. However, because of technology advancement, the trend today in organizations is toward using a high degree of data collection and employee monitoring, which will only increase in the future. With the ability to analyze this data readily available, TD professionals now have the capability to create training that is customized to individual learner needs. Learners, in turn, are expecting this type of highly customized content, having surrendered their rights to the great cookie gods of the internet.

A recent Deloitte (2019) research blog post stated: "Right now the concept of career is undergoing a radical transformation. With employees in the workforce for 60-plus years and a declining half-life for skills, workers are looking for an environment that offers constant learning and development (L&D) opportunities. Employees are no longer learning to gain skills for a career; now, the career itself is a journey of learning."

In the current reality of continuous change, the focus on employee development is fluid and includes reskilling, upskilling, and new skilling. This may be one reason the growth rate for training professionals looks so bright. According to the Bureau of Labor Statistics (BLS) *Occupational Outlook Handbook,* the growth rate of the field is expected to be more than twice that of the overall national job growth average—which was 4 percent at the time BLS released its report based on 2018 data. Currently it projects a 9 percent growth in the field of training managers from 2018 to 2028. For training and development specialists (non-managers) the growth rate is 9 percent, which is also faster than the average. Organizations such as the Institute for the Future and futurists such as Bernard Marr are also sources of information on what to expect in talent development in a changing workplace.

What to Consider

Contrary to the truism "if you do not know where you want to go, any road will take you there," there are many things to consider when making the transition from teacher to trainer. And while many skills can transfer, there is a lifestyle difference between these paths as well. Here are some quality of life and professional issues to consider.

Collaboration

Corporate learning or training is a team sport. It requires extensive collaboration and engagement with a variety of associates, stakeholders, vendors, and, most importantly, the client.

Schedule

The hours and time commitment are different. Generally, a teacher's schedule is fixed based on the local district calendar. Hours depend on rules and regulations. Corporate talent professionals may have more flexibility for scheduling personal time off—but may also be required to travel both locally and internationally. Additionally, as exempt employees, trainers are expected to accomplish certain work milestones, even if that means exceeding 40 hours per week—and that has implications for your evenings and weekends.

Global Scope

Most organizations have virtual employees, some of whom are in different time zones. For collaborative projects and meetings, you may need to be available later at night or early in the morning to accommodate their scheduling needs. Additionally, your employees may be scattered all over the globe, which means you may be required to take your show on the road, and travel extensively.

Technology

The platforms may vary, but technology is ubiquitous in corporate training, from learning management systems (LMSs) to artificial intelligence. Especially if your role is being a live virtual instructor, you'll have to learn several platforms very thoroughly to build, deliver, and measure learning content.

Change and Culture

Change is the norm. Change in people, the work, technologies, processes, and organizational structure are also happening—sometimes simultaneously. In most organizations, there are five generations in the workforce, and there is a continuous need for upskilling and reskilling. Helping others to accept these changes can be an entire role in and of itself. To get an organization to make a behavioral change, the training should be geared toward the culture the organization wants.

Talent professionals have the opportunity to influence and enable a high-performance culture. Because of their ability to influence actions and behaviors, understanding the uniqueness of an organization is imperative. Every organization has pluses and minuses in the way it operates.

Pay and Benefits

These vary depending on industry, roles, credentials, specialty, certifications, location, and a variety of other factors. Generally speaking, the pay scale and benefits in corporate workplaces trend toward allowing more room for long-term growth than a teacher salary.

Moving Forward

Changing careers is a major defining moment for most adults. While on the surface there may seem to be many commonalities between teaching K–12 and being a corporate trainer, in reality the latter is a broad field that has numerous sub-specialties. There are books, coaches, and networks that can assist, but it will still take a personal investment of time and effort to transfer your skills and make the switch. As you think about your own transition, consider these questions:

- What values are most important to you?
- What are the principles you hold most dear?
- What are your current career goals?
- How do others see you—in other words, how do you show up in a group?
- How prepared are you to reach your goals?
- What are the critical gaps you will need to close to move toward the goal?
- What options are available that satisfy your goals?
- What do you need to learn about the options and the opportunities?
- How might you learn more?
- Who might be able to assist you?
- What are your parameters?
    - Are you willing to move?
    - Can you be without an income-producing job for any length of time?

    - Do you need agreement from other family members?
    - Can you afford to be without benefits for a period of time?
- What is your action plan and what are the milestones you want to meet?
- Which of your skills are most transferrable and therefore most marketable?
- Is a side-hustle an option and, if so, what might it be?

Here are some cautions to be aware of to manage your expectations as you enter the corporate learning arena:

- Expect to be in a continuous learning state; get comfortable with not knowing things, and practice learning at the moment of need.
- The pay varies—and might be lower than you expect.
- The learning curve may also be steeper than you thought.
- The culture may not be a fit.
- When the economy is good, training jobs are plentiful; when the economy is bad, training jobs suffer.
- You may start with only a couple of weeks of annual personal leave.
- There will be days that you ask: Why did I make this change?

What I Would Have Done Differently

"I would have reached out for a business mentor while I was a facilitator. Not an executive, but a higher middle manager to teach me the business side of the company and terminology in general. That would have been a great multiplier for my career. And I would have read more business books."

—Scott Pitts

Here are some other ideas:

- Network with other corporate trainers and ask lots of questions; however, remember that their title may not be "corporate trainer."
- Join LinkedIn, and after posting your credentials and successes in your profile, join groups related to learning and training.
- Use career and leadership awareness tools, such as the tried-and-true ones from *What Color Is Your Parachute?*
- Develop a resume with a documented portfolio demonstrating your strengths and how they have made an impact. Focus on experiences and results. Include project summaries and testimonials.

Use the language of managing and leading. Float your resume to colleagues and companies and use the portfolio for interviews. This documentation will help you remember what you know. It will provide information for your thinking and decision-making processes. Additionally, documenting your projects can help you to spell out what worked and what did not work.

- Codify lessons learned by writing blog posts or articles to make your work and ideas public.
- Start out by teaching adults at familiar places, such as a place of worship, community volunteer groups, children's schools, or the local library, and make a list of such opportunities. These depend on your situation, but if you do not want to relocate, explore opportunities in your area and code them by type of industry; use this list as you investigate websites, LinkedIn connections, and so forth.
- Request informational interviews with people in corporate training or HR. Go armed with your portfolio and questions and make sure you ask, "What other talent professionals would you recommend that I talk with?

When a door opens, just go for it; get into the fray—don't wait to become an expert.

Summary

As with any job there are pluses and minuses to being a corporate trainer regardless of your role, the organization, or the title. One standard benefit can be found the axiom: If you want to really learn something, teach it to others. Thus, you can become more of an expert on the topics you design and teach. Other benefits include becoming a better communicator, the ability to practice collaborative decision-making to solve major problems, developing project management skills, and making a difference in the lives of others.

There are dozens of paths available to move from teaching K–12 to corporate training. However, they all start with the same first step. Henry Ford said, "Before everything else, getting ready is the secret of success." And the *Gamestorming* authors state, "perhaps nothing is more important to exploration and discovery than the art of asking good questions. Questions

are the fire-starters. They ignite people's passions and energy; they create heat; they illuminate things that were previously obscure" (Gray, Brown, and Macanufo 2010).

So, using your questions, conduct some research. Use the responses to figure out which road you want to take. Assess your current skills and determine the gaps. Document an action plan. Develop a one-page document that outlines what you want to do and why, including the tradeoffs you are willing to make as opportunities surface. Once this is mastered, develop your 30-second stump speech for your goal. Continue to build your portfolio and conduct research. Continue to ask questions about the answers to the original questions. Seek opportunities by casting a wide net.

Remember, while it might seem like it is a huge difference and an enormous change to move into corporate training, at the end of the day it is a role for those who love supporting people and creating opportunities for them to enhance their capabilities to succeed in their jobs. It is a dynamic and shifting world with broad responsibilities and huge challenges. It is also a profession with many opportunities to connect, collaborate, and share with others and excel as a leader working with others to solve business challenges. Most importantly, though, it is a role that not just requires, but demands personal growth and continuous learning.

If standing up in front of a classroom is what you love about teaching, you might feel you are your most alive when you are in a training room delivering a course to your learners. Or you might enjoy more the development of that curriculum—those interested less in the delivery might feel that instructional design is more their cup of tea. While many trainers also do instructional design, there are roles where you can focus on one or the other. Read on to find out more how the two are different and decide which one, if either, is right for you.

Chapter 3

Instructional Design: Transform Your K–12 Skill Set

Leah Yeatts and Kari (Knisely) Word

"When I first started exploring opportunities outside teaching, I turned to my friend Sandra, who had recently left teaching K–12 to become an instructional designer. I thought the title had an almost mystical quality: instructional designer. I was intrigued, fascinated, and very puzzled. Although I thought it was a long shot, after much encouragement from Sandra, I started applying for instructional designer positions.

"To my surprise, I was contacted for an interview. To say I was freaking out is an understatement. I felt unqualified. I thought I would look like a fool because I 'only' had experience as a teacher. Sandra reminded me that they would not have called for an interview if I was unqualified. She told me how similar teaching and instructional design can be. Sandra reassured me that, at a high level, instructional design is like creating lesson plans, and she provided me with a few key terms to research before the interview. After a series of interviews and development of a work product, I got the job!

> "While I still had a great deal of expertise to build before becoming successful in instructional design, the first hurdle was to understand the opportunities that existed. Once I learned enough about the field to set some goals, I was well-poised to build my knowledge, skills, and network to grow as a learning professional."
>
> *—Leah Yeatts, Owner and Principal Consultant, Lever Performance Consulting; Former Teacher*

What Is an Instructional Designer?

You can ask 20 different instructional designers what they do, and you will probably get 20 different answers—all describing various skills.

The opportunities of instructional designers are endless, and your skills as a teacher are transferable to the role of instructional designer. Although some teachers leaving the classroom may find an instructional design role within days, weeks (similar to Leah), or months, it also may take longer. This chapter will equip you with some of the groundwork to get off to a good start in your search should you decide it is for you. We will dive deeper into what instructional designers do, discuss skills needed, provide you with steps for moving forward, and take a look at the job market.

Evolution of the Instructional Design Field

First, let's take a look at how the instructional design field has changed over the years.

1940s: World War II

The first audiovisual instruction was created by combining visual instructional media from the early 1900s with audio instructional media of the 1920s. In World War II, the focus of instructional media switched away from education and moved to military training. During the war, several psychologists and educators collaborated to help design and develop training programs for various roles within the military (Reiser and Dempsey 2018). The military had the ability to train and prepare soldiers faster than they or their enemies expected—possibly leading to their success. In 1943, the ATD began as the American Society for Training Directors with 15 men in Baton Rouge, Louisiana.

1950s: Post–World War II

After the war ended in 1945, this new field of study focusing on how to improve training, instructional design, was born. A few of the items studied and researched were programmed instruction, behavioral objectives, criterion-referenced testing, and formative evaluation.

1960s

Through the 1960s, the field of instructional design still focused primarily on the effects of media and instruction. In 1962, the International Society for Performance Improvement (ISPI) was founded.

1970s

In the 1970s, the field began to focus on a systems approach to instructional design. In 1973, the United States Department of Defense selected Florida State University's Center for Educational Technology to develop an instructional systems design (ISD) model called the Interservice Procedures for Instructional Systems Development (IPISD). This ISD model consisted of five stages: analyze, design, develop, implement, and control (Olsen and Bass 1982; Molenda 2015).

ADDIE (which stands for analyze, design, develop, implement, and evaluate) has become one of the most popular terms you will hear when people discuss instructional design. Molenda (2015) suggests that it is slightly unclear exactly who is to credit for the term, but over the years ADDIE has become an umbrella term that describes most other models used. Each person makes their own meaning, further expanding the ADDIE model into other more specific models or processes.

1980s

The field of instructional design began to recognize that media alone did not solve instructional problems.

1990s

Now it was clear that the focus of the field needed to expand beyond instructional problems and include attention to performance problems. The result was the creation of human performance improvement (HPI) methods.

2000s

The 21st century has seen yet more advancements in media with mobile devices, social media, and more, all of which continue to provide new opportunities to deliver solutions to instructional and performance problems.

ADDIE

At the core of every instructional designer's role is their process. The ADDIE process is very common, and provides a good foundation to understand some of the different tasks involved in being an instructional designer. We will go into more depth here.

Analysis

The first phase of ADDIE is analysis. Much variation exists in how instructional designers conduct the analysis (or needs analysis) phase of ADDIE. Four components of this phase may be used: organizational analysis, performance analysis, learner analysis, and content analysis.

Organizational analysis involves looking at the organization's goals, mission, vision, strategy, and culture to provide context and direction for the rest of the project.

Performance analysis examines the specific employee performance needed to reach the organizational goals. In other words, after the instructional designer determines what the organization is trying to accomplish as a whole, they look at what people need to do to make that happen. A well-trained instructional designer defines a performance gap: the difference between what employees are doing or are able to do, and the performance needed to reach the business goals.

Then they ask a crucial question: What is the cause of the performance gap? It is important to be aware that not every performance gap is caused by employees not knowing what to do, or not having the necessary skills. Sometimes, a gap exists because the employees don't have adequate resources, time, communication about expectations, feedback from their manager, or motivation to do what is expected. There can be many reasons why employee performance is different than what is desired. Determining the causes of the performance gap allows the instructional designer to decide which solution will effectively close the gap.

Learning solutions should only be applied when a lack of knowledge or skills has been clearly established as the cause of the performance gap. If a different cause of the performance gap is found, the designer may need to switch to a different model.

Learner analysis allows the instructional designer to become familiar with the learners, including educational backgrounds, work context, level of comfort with technology, attitudes, abilities, resources, and prior knowledge. Most teachers take time to get to know their students, and they use this knowledge when planning lessons. Teachers know that classes with different backgrounds, different levels of foundational knowledge, or different learning environments don't benefit from a "one size fits all" approach. In the same way, a learner analysis helps the instructional designer to tailor their work to their learners.

Content analysis includes collaborating with subject matter experts (SMEs) to gain an in-depth understanding of the desired performance, task, or knowledge that learners need. The instructional designer may also observe or interview employees, conduct a survey, or review existing documentation, such as policies or procedures. The content analysis results in establishing what information will be included in the learning solution.

"As a math teacher, I was provided with a curriculum, worksheets, and ways of teaching from textbook publishers. I would also usually review the content I was supplied by my school district or department, and I would conduct my own content analysis to teach my students. For example, when I taught a unit on fractions, I would do tons of research online and talk to other teachers to gather ideas to create my own lesson. I wanted to ensure I created a lesson plan that included all the building blocks and steps needed for my students to learn the basics of fractions. I would essentially reteach myself the process from the most basic fundamental step so I would not leave out any important pieces," says Kari, who adds that not necessarily all teachers do these steps and not all of them would consider this analysis a "content analysis."

Design

The next phase of ADDIE is design. When K–12 teachers design instruction, they create lesson plans that may include learning objectives, activities, assignments, and assessments. For instructional designers, the design phase

also includes creating a plan or blueprint for the learning solution. First, the modality of the learning solution is selected (e-learning, instructor-led, a blend of online and instructor-led, or another option).

For an instructor-led program, a designer might create a detailed instructional plan that includes all the events that will occur during the session, such as lectures, discussions, activities, or assignments. For e-learning programs, a designer creates a storyboard that describes all of the audio, visuals, and interactions that will be included in the module. A storyboard may be as simple as a table in a word processing document, or a PowerPoint file showing visuals, with notes to show the voiceover script. E-learning instruction and the differences between that and face-to-face instruction will be discussed in-depth in the next chapter.

Note that the term instructional design is sometimes used to describe this particular phase, and sometimes used to describe the whole ADDIE process.

Development

After teachers create a lesson plan, they may create worksheets, organize project materials, make PowerPoint presentations, or create other materials needed for conducting the lesson. During the development phase, the instructional designer also creates the learning solution based on the plans from the design phase. For an instructor-led solution, a designer might create a PowerPoint presentation, a video, an instructor guide, and participant materials. For e-learning programs, a designer might create a module using specialized e-learning authoring software, such as Articulate Storyline or Adobe Captivate. Depending on the design, they may also record voiceovers, make videos, edit images, or create animations to include in the module.

Implementation

Implementation is when the learning actually happens. For teachers, it consists of teaching the lesson. In an organization, implementation may take place when learners attend a class, take an online course, or otherwise use the learning solution provided. Most instructional designers don't facilitate instructor-led training. Those who facilitate are described in chapter 2 and are considered trainers. However, some instructional designers fulfill both roles.

Evaluation

Evaluation determines whether the learning solution met the intended goals. Teachers evaluate how much their students have learned using tests and assignments. State-run testing also occurs to ensure K–12 students are learning enough in their classrooms—which can also serve as an evaluation of the school and the teacher. For instructional designers, an evaluation may measure knowledge, such as an assessment given to learners at the end of a training event (not unlike a test given in a school classroom). The evaluation may also assess learners' performance on the job after the training experience has taken place. When feasible, an evaluator may measure progress toward business goals that the solution intended to affect.

Example: Problem Solving Using ADDIE

Analysis: Receptionists at a national chain of spas are entering client appointment information into the new computer system incorrectly. The instructional designer interviews the receptionists and their managers and determines that the receptionists do not know how to enter the information correctly. The instructional designer talks with spa management to determine the proper procedures and examines the documentation provided with the software. Together with the spa managers, the designer develops a detailed outline of what the receptionists should do and how they should do it.

Design: The receptionists are geographically distributed, so the client agrees that an e-learning module is the best way to deliver the training. The instructional designer uses a word processing program to create a simple storyboard showing all the visuals, voiceovers, interactions, and an assessment for the end of the module. She asks the managers to review the storyboard and submit any requested changes before she moves on to development.

Development: The instructional designer records voiceovers, edits images, and creates the e-learning module using an e-learning authoring tool.

Implementation: The final module is uploaded to the company's learning management system (LMS). Receptionists are sent deadlines for completion and instructions for accessing the module. On-site managers follow up to ensure receptionists complete the module.

Evaluation: Receptionists score well on the assessment at the end of the module. After two weeks, managers check to see if receptionists are entering client appointment information into the computer correctly. Only a few, minor

mistakes have been made. Managers reach out to those receptionists for brief, one-on-one coaching sessions to correct the errors. Two weeks later, appointment information in the system is checked again, showing that all receptionists are now entering client information correctly. The instructional designer revises the module to reinforce the area where some of the learners struggled, so that the module is the highest quality possible for future hires who will use it.

The ADDIE process may seem quite linear—as if you should complete one phase prior to the next—but it should not be used rigidly. Many instructional designers use the phases cyclically (iteratively), or they may bounce around between phases depending on the need to do so. Here are some examples of how the phases of ADDIE might vary in their application:

- The evaluation shows that there is room for improvement in a course. These results further inform the analysis phase, which leads to changes in the design and development for subsequent versions of the course.
- During the analysis, design, and development phases, an instructional designer considers how the learning solution will be evaluated.
- During the creation of a PowerPoint presentation for a new classroom course (development), the team recognizes that an additional section of information is needed. They conduct some analysis on the missing components and revise the design and development accordingly.
- During a pilot test of an e-learning module (evaluation), users have difficulty navigating to the next section. Developers use that information to troubleshoot and make changes in the development of the module before it is officially launched.

There are many possibilities for how the phases can be used. What's important to remember is that an instructional designer should be thinking about all the phases all the time, rather than treating them as linear steps to be completed in isolation from one another. Ideally, none of the phases should be omitted.

Beyond ADDIE

There are many other models, processes, theories, and frameworks that instructional designers use—some in conjunction with ADDIE, and others in place of ADDIE. Some universities, certification programs, professional associations, and other organizations also develop their own models, processes, and frameworks. Some of the most common include:

- **ASSURE Model:** a six-part model to instructional design
- **Bloom's Taxonomy of Instructional Objectives:** a framework for classifying instructional goals
- **Dick, Carey, and Carey System Design Model:** a systems approach to instructional design
- **Gagné's Nine Events of Instruction:** a model for designing instruction
- **Keller's ARCS Theory of Motivational Design:** a framework for designing instruction to maximize learner motivation
- **KEMP Instructional Design Model:** a framework for instructional design
- **Kirkpatrick's Four Levels of Evaluation:** a model for evaluating the effectiveness of learning
- **Merrill's First Principles of Instruction:** a set of instructional design principles
- **Successive Approximation Model (SAM):** an iterative version of ADDIE
- **Universal Design for Learning (UDL):** a way of thinking that leads to a more flexible design of instruction.

Instructional designers usually use these models, processes, theories, and frameworks in various combinations. For example, when designing a program to train new hires at an organization, you could use Bloom's Taxonomy to create instructional objectives; Merrill's First Principles and Keller's ARCS Theory to guide the design of the various courses; and Kirkpatrick's work to design a plan to evaluate the effectiveness of the program. There are myriad other models and theories—too many to include in this chapter—but gaining some basic familiarity with those we've listed is a good place to start. You can find more on these models in the additional resources at the end of this book.

Modalities

Instructional designers create end products in different modalities, including e-learning (online), instructor-led training (ILT), or a blended approach, which combines online and classroom environments. Online training that is self-paced is called asynchronous online training; virtual instructor-led training (VILT) that occurs at a scheduled time, on the other hand, is called synchronous online training. These will be discussed more in-depth in the next chapter on e-learning.

Instructional designers may also create performance-support resources, which could be as simple as a one-page document explaining a procedure, or as complex as an electronic system that provides guidance to workers on the job. These professionals may contribute to mentoring or coaching programs, informal learning opportunities, or any kind of nontraditional learning and development solution.

> "Online courses get a bad rap from most people because they are usually done poorly, but I love being able to work with current online courses to improve them as well as create engaging online experiences."
>
> —*Kari (Knisely) Word, Instructional Design Consultant, Instructional Design Studio LLC; Doctoral Candidate at Florida State University Instructional Systems and Learning Technologies Program*

Specializations

Instructional designers may be generalists, or they may specialize in a particular area. Some areas of specialty include:

- needs analysis
- e-learning development
- design for instructor-led training
- instructional technology
- instructional design project management.

Transferable Knowledge and Skills

To successfully move into instructional design, teachers can build upon and expand their existing skill sets. As you can see from the prior section, teachers already know how to:

- design learning for classroom environments
- use effective instructional strategies
- keep learners engaged
- assess knowledge.

"There were so many times when I first started in instructional design that I would hear a phrase like 'data analysis' or 'evaluation' and I didn't appreciate that I had experience in it. After a while I realized I had been doing similar data analysis with my student test scores for years—only it wasn't called that. As teachers, we never talked about 'gap analysis' or 'data analysis.' Students would simply take a state-administered test and we were given their results to see where the learning gaps were. Some teachers would go to the extra effort to identify the most common test questions their students had missed on prior exams and which state standard they were tied to, then identify possible causes and focus on reteaching the content or one-on-one tutoring. I was essentially analyzing learner data, identifying gaps in knowledge, and creating solutions to close that gap. So, I was already doing some data analysis, but it took me a little while to make that connection."

—Kari

Teachers have interpersonal and communication skills, which are critical when working with learning teams, learners, SMEs, and other stakeholders. Some teachers also have experience with learning technologies and tools that can be used in instructional design.

A study by Klein and Kelly (2018) found that employers expect all designers to be competent in instructional design, communication, interpersonal skills, management, personal skills, and instructional technology. Employers expect instructional designers to use instructional design principles, methodologies, and models. They expect them to be able to manage their projects from beginning to end, including coordination of all stakeholders. Employers expect instructional designers to be equipped with how to best use technology—considering possibilities and constraints in each situation.

The Learning Guild (2014) reports the top eight skills most desired by managers who are hiring instructional designers involve the ability to:

- **Evaluate courses:** Instructional designers need to be able to use summative and formative evaluation to evaluate courses.
- **Manage projects:** As we discussed earlier in this chapter, project management is key to ensure a project like a training course stays on time and that the instructional designer can account for all deliverables.
- **Collaborate with SMEs:** As a teacher, you are usually working with students in a very different capacity than when you are working with SMEs. Collaboration with SMEs is a skill that may come naturally to teachers who can build rapport, communicate effectively, and follow through as expected.
- **Conduct needs analysis:** Instructional designers should be able to conduct a needs analysis to ensure the root cause of the gap is identified.
- **Develop content:** It is very common for a designer to receive a series of PowerPoint slides or documents and be expected to figure it out. Knowing who to contact, when, and how to develop the correct content using good instructional design is imperative.
- **Write objectives:** Instructional designers need to understand how adults learn, with and without technology. They should also know how to align learning activities and assessments to objectives.
- **Manage courses:** A key difference between teaching and instructional design is the level of involvement with the learner or student. Teachers are able to interact with their end users, students, to make corrective actions on the fly. They are able to quickly assess their students' understanding of the content because they can view scores and take corrective action immediately. While teachers are able to gain access to evaluation immediately, instructional designers are not. Instructional designers are usually in the background and rarely interact with the end users with the possible exception of the analysis phase. Instructional designers rarely receive assessment results for the instruction they created and usually are not with the end users at the time of implementation to take corrective action on the spot.
- **Document and administer courses:** Some teachers may be very comfortable with the use of instructional technology while others

may not. They may use a SmartBoard, clickers, mobile devices, or a computer lab while delivering instruction. Although not all instructional design jobs require experience with instructional media, many do. Every day, we as a society are becoming more reliant on technology so we really should be trying to learn how we can use media in the classroom to stay relevant. Instructional designers often need basic experience in using e-learning authoring tools; editing audio, video, and images; and graphic design. Many instructional designers also work with an LMS.

Depending on the position, some hiring managers may value consulting skills as well as business acumen, including financial literacy, understanding the language of business, and being knowledgeable about relevant business issues and decisions.

What You Need to Go Forward

> "Making the leap from teaching to talent development was one of the most challenging and most rewarding things I have ever done. I truly love my work today—especially being able to solve problems, help clients, be creative, continually challenge myself, and affect positive change in organizations. Making the transition successfully required a lot of work, but it was absolutely worth it."
> *–Leah*

If you think instructional design is the career move for you, there are three major things that you need to do to move forward successfully: develop your skills, update your resume, and network.

Develop Your Skills

While instructional designers use many skills that teachers already have, they may also need additional knowledge and skills to be successful in the field. Some ways to continue your development include:

- certificates and certifications
- graduate and post-graduate degree programs
- conferences and events
- books, blogs, YouTube, and forums

- learning from your network
- teaching yourself
- volunteering.

Certifications

Various professional organizations and educational institutions offer a mixture of certificate and certification options (see the additional resources section in the end of this book). You may also want to consider researching other certifications with organizations like ATD, the Society for Human Resource Management (SHRM), *Training* magazine, and the Project Management Institute (PMI). A master's degree can also be beneficial for many in the field.

Degree Programs

While a degree related to instructional design may not be an absolute requirement for entry into the field, it can provide a solid foundation and help boost your knowledge, skills, and credibility. Check out your local college for online and in-person courses. You may also want search for online programs that interest you in other states. In addition, use your network to ask around and get their opinions on where they went and what they liked or disliked about their program. Sometimes, if you get your foot in the door at an organization, they may cover the cost of at least part of your degree. You might start at a lower level and then build up with the inclusion of this degree, but with half the student loan debt.

> "Although I am sure I could have eventually gotten to where I am now without a degree, it would have taken me much longer and it may have been harder to accomplish without earning my master's degree in educational technology."
>
> —*Kari*

Conferences

The number of conferences and events being offered on a local, regional, national, and international scale and online is amazing. Visit the websites of the organizations or associations that interest you and don't forget to look at both local and national levels to make sure you are finding all the events.

For example, you may want to look at ATD, SHRM, Association of Change Management Professionals (ACPM), International Society for Performance Improvement (ISPI), or the Project Management Institute (PMI).

Blogs and Forums

The amount of informal learning that is now available at our fingertips is extraordinary. The problem is trying to decide what is and what is not good content. That is one risk of not getting a formal education or certificate. Remember not to take everything you read and learn as being accurate. Always try to cross-reference it, and check with others—especially if it doesn't seem right.

Teaching Yourself

Dive in and just get it done. This overlaps with informal learning options, but can also include trial and error. For example, you might sign up for a free trial of software you want to learn. Experiment in the program and create something. You can then send it out to your contacts asking for feedback so you know what changes to make the next time.

Take courses from a low-cost online learning platform, such as:

- LinkedIn Learning
- Udemy
- Coursera
- Skillshare
- YouTube tutorials.

Volunteering

Locate nonprofit organizations or charities where you can volunteer your time to build your portfolio and resume while solving real-life instructional and performance problems.

Portfolios and Websites

While updating your skills, make sure to document and record progress of what you have accomplished so you have items to share with potential employers. You will find that most potential employers will ask to see some of your work or your portfolio. To some, a portfolio may be a fancy professional online website. To others, it may include a few copies of some work on their local drive that they can share via email or a screen share

conference presentation with a potential employer. The goal is to be able to show your skills.

Although a portfolio is a great asset, often a few work samples are sufficient to demonstrate your skills. Don't let the creation of a portfolio prevent you from moving forward in your job search. Networking is key. If you have built good relationships and established good rapport—even if you don't have the best skills—showing something is better than nothing. If you are a coachable person, that is even better.

Update Your Resume

Although many of the skills teachers have are transferable to instructional design, it is important to communicate them in the language used by the human resources representative, hiring manager, or recruiter reading your resume. If they have not been a teacher and do not know what teachers do, then they may not think you are qualified for the job. This is unfortunate, because many teachers are qualified.

Most resumes are created in chronological order by date of employment—listing your title, employer, and then a few bullet points. This works for a teacher's role, but to be noticed and taken seriously, you may want to consider using a skills-based resume instead. A skills-based resume highlights your skills across your different positions, rather than listing job titles and roles.

For example, you may have three headings: Analysis, Design and Development, and Collaboration. The analysis heading may list your experience getting to know your learners' backgrounds, skills, knowledge, and abilities. The design and development section may list a curriculum you designed as well as any learning activities, worksheets, and assessments created for it. The collaboration section may include reference to working on or leading vertical and horizontal teams within your school or district.

A skills-based resume allows you to more easily use some of the key words seen in an instructional designer's job description on your resume. Sometimes you may believe you can't take credit for certain terminology. That is normal. As long as you are not lying and you are just changing the terminology so that it makes sense to a hiring manager, that is the main thing that matters here. (The resources at the end of this book include a resume example and suggested changes.)

You can choose to pay someone to help you, or you can do it yourself with the help of some online searching and time. Browse the resumes of current instructional designers. The more people you talk to, the more confident you will get about what you know and the better you'll feel about using unfamiliar terms. Reach out to your network and see if someone in the field can help you with your resume.

Table 3-1 lists some examples that you may want to consider.

Table 3-1. Translating Teaching Terms Into ID Terms

Teaching Terminology	ID Terminology
Students	Learners
Taught; teacher	Instructed or facilitated; instructor or facilitator
Instructional coach, specialist	Coached staff or employees
Lesson plan	Curriculum guide, plan, or map; course guide, plan, or map; design document
Identify at-risk students	Analyze learners
Identify problem areas in lessons	Analyze content
Develop worksheets and PowerPoints	Develop instructional materials
Deliver lessons	Implement instructional solutions
Review student scores to implement solutions	Evaluate learner progress or analyze learning analytics
Manage the classroom	Manage the learning environment
Classroom management	Facilitation
Assist with school or district-wide 1-1 student device or e-learning program	Assist with implementation of technology, software, or hardware program
Manage or create student e-learning assignments and status	Manage learner content within the LMS
Create Smartboard lessons	Create interactive PowerPoints or e-learning programs
Train district teachers	Conduct train-the-trainer sessions
Follow school-wide policies or deadlines	Manage project tasks within specified project deadlines
Excellent time management skills	Project management skills or managed x projects

Adapted from Knisely (2019)

Networking

Networking is probably one of the most important things you can do while making the transition out of the classroom into any field you are looking to enter. Without networking, you don't know what and who you don't know. When you network with others who are currently in the role that you would like to be in, you will be exposed to terminology, thoughts, and differing perspectives that you may not get any other way. Networking helps you create a road map that can guide you through your journey in this field. In addition, networking and forming relationships may be more important than already having some ID skills, because some employers would rather hire a good employee they know they will be able to coach and build up their skills. This is all the more reason to get out there and network.

As a teacher, you may or may not have had the opportunity to network with other teachers outside your team, school, and district. As an instructional designer, you will have networking opportunities that include online webinars, social media, or in-person gatherings.

Network by Joining Professional Associations

What is a professional association? A professional association is usually a well-respected organization that individuals look to for industry trends, news, publications, and certifications. ATD, one of the best-known professional associations in our field, offers national and local memberships that allow you special privileges such as access and discounts to events, news, and publications. You usually do not need to be a member of an association to attend events, but there are usually several member perks. Here are some ways to take advantage of the opportunities professional associations offer:

- Attend local professional association events by ATD, PMI, ISPI, ACMP, SHRM, and others.
- Attend local, national, and international conferences offered by the above-mentioned professional associations as well as the Learning Guild, *Training* magazine, and others.

Network With Social Media

There are several ways to enhance your chances at a career change through social media networking.

LinkedIn

Make sure you have a presence on LinkedIn. Create a profile and ensure that you are using the terminology from the instructional design field rather than terminology used in K–12 education. This is covered further in the discussion of updating your resume.

You can locate and join various groups within your specific interests whether it be Adobe Captivate, return on investment (ROI), instructional designers, or trainers. You can use the 13+ search field panel to search for, connect with, and learn from those in the industry.

Groups

You can join groups on LinkedIn, Facebook, or Reddit. Start by searching for instructional design or e-learning groups and you will be amazed at the options that are out there. Remember, you usually only get out of it what you put in. You may want to try to find a group that is active, supportive, and encouraging to those who are involved. Start by searching for the ATD Teaching to Training LinkedIn group and join.

Thought Leaders

Watch the news online; read newspapers, industry journals and magazines; and explore Twitter and LinkedIn to locate thought leaders in your industry to follow. Content curation tools such as Scoop it and Refind collect articles based on your interest in reading, sharing with others, and soliciting comments on them. These practices will help build your credibility in the field as well.

Twitter Chats

Twitter chats are different than what you may think. A Twitter chat is usually set up by a group of people who share a common interest and use a common hashtag to communicate synchronously. They typically meet one time per week for about an hour. A moderator posts a series of question prompts and those who are live online will reply, network, collaborate, and comment with others in the chat. You need to at least try one at some point. On Twitter, #lrnchat, #edchat, and #guildchat are just a few examples to get you started in your search.

Local Meetups

If you are interested in learning a software program, you can look to see if there are any local meetups in your area.

Webinars

Several professional associations offer daily live webinars—with and without video and audio—where you can network with others.

Podcasts

Although listening to podcasts is generally more of a learning activity, it is possible to network with other listeners, the host, and guests on the show.

Phone Calls

If you know of a company that you want to work for, call or email a manager in the HR department or a connection on LinkedIn and see if they will notify you of openings, or offer to take them to lunch to talk about the industry or their company. You can also use LinkedIn's many search fields to locate people who already work in the role that you are interested in. Connect with them and ask to set up a phone call to discuss the industry, their job or role, and the company. Remember to send them an email or card thanking them for their time.

Even if you don't personally know everyone on your contact list, send them a message wishing them a happy holiday, a good day, or a good weekend. In addition, post open-ended questions on your social media feeds to start dialogue and build rapport. Email or send a private message to at least one person per week to see if they will meet for coffee or a virtual hangout.

> "I attended my first ATD meeting while I was still teaching. I walked in not knowing many people, and sat down at the only table with open seats. The people at the table started asking me questions about what I did as a teacher, how I heard about ATD, what I wanted to do after teaching, and how I planned to get there. I was nervous and unsure of myself in my responses. Little did I know, I was speaking with a few very well-respected professionals in the field of instructional design, who just so happened to be the speakers for the event."
>
> *—Kari*

If networking is new to you, you may not know where or how to start. The first step is to connect with others, but that is only the tip of the iceberg. You will only truly be networking with others when you learn how to build professional relationships with them. Well, how do you do that? How did you build a relationship with your friends? Most likely the relationship started with a conversation, so connecting with or meeting with someone is not enough. You need to start communicating with them.

If you can find a mentor, especially a teacher who has paved the path you are most interested in following, their lessons and personal help can be invaluable. To find a relevant and worthwhile mentor, though, you need that solid network and referrals.

Getting Started: In-Person Meetings vs. Online

Whether you are networking in person or online, the following apply. If online, you will use electronic media to foster conversations whether through email or a social media platform such as Twitter, LinkedIn, or Facebook. If in-person, you will need to ensure you are presenting yourself how you want others to view you. Here are a few tips to help you get started:

- **Get them talking.** Do not monopolize the conversation. Ask yourself: Who is doing most of the talking here?
- **Get to know the other person professionally.** Your goal should be to find out what they do in their role at their job, how they got there, what their company does, and how you can relate or not.
- **Learn about their industry.** Ask questions about the past, present, and future of their industry.
- **Research and ask questions.** Don't act like you know what they are talking about if you don't.
- **Ask about their professional life.** It shows you are interested.

The Future of the Field

The job market for instructional designers is vast. Instructional designers work in all sectors and in various industries. In the public sector, instructional designers may work in K–12 education, higher education institutions, the military, or government. In the private sector, instructional designers may

work in healthcare, retail, hospitality, transportation, heavy machinery, mining, beauty, telecommunications, or other businesses. They also work in the nonprofit sector. Instructional designers can work internally as part-time or full-time employees, or externally as freelancers or consultants.

> "I've been able to use my instructional design skills in a number of different roles. First, I was an associate instructional designer for a subsidiary of a Fortune 500 company. In that role, I focused primarily on virtual training for new employees distributed across the country. Next, I worked as an instructional designer for a not-for-profit where I designed e-learning solutions and supported the organization's learning technologies. Recently, I started my own learning and performance consultancy where I specialize in strategic performance consulting, learning strategy, and custom learning solutions. I get to work with a wide variety of clients in various industries—including retail, travel, and hospitality."
>
> —*Leah*

Here are a few statistics related to the job market for instructional designers:

- According to Recruiter.com, there is an increase in need for instructional designers—vacancies from 2004 to 2018 increased by 20.82 percent and the demand for them is expected to go up.
- The Learning Guild's *2018 eLearning Salary and Compensation* report showed that 90 percent of survey respondents reported being "very happy" or "happy" with their jobs, and 35 percent said they "loved" their jobs.
- According to Glassdoor.com in July 2019, the average base pay for an instructional designer in the United States was $62,300 per year.

Future Trends

Today's world is leveraging smartphones and other mobile devices like tablets to have training accessible 24/7. Delivering mobile-friendly graphics and training materials can pose a whole new set of challenges and opportunities for those looking to enter the field.

To really understand the job market for an instructional design role you are interested in, the best thing you can do is reach out to, network with, and connect with those who currently are doing what you would like to do. If you do not know what you want to do yet, then start by comparing and contrasting what you learn about the roles of those currently in your network. One thing you will notice, if you have not already, the field is full of professionals who are happy to help educate you along the way.

Due to recent technological trends, there has been an increase in online education and instruction and less in-person classroom education and instruction; mobile learning and performance support, gaming, virtual reality (VR), and augmented reality (AR) are all on the rise. There is a need for learning analytics and data analysis. All of these trends that center around learning require good instructional designers.

Summary

Many of the skills that teachers possess are transferable into an instructional design role. If you are interested in making the move to instructional design, you should focus on broadening and translating your skill set, updating your resume, and networking. While researching the job market and future roles, remember that the responsibilities and expectations of an instructional designer may vary greatly depending on the role and industry.

While our journeys from teaching to instructional design differed, we both found success by furthering our formal education, expanding our skill sets, and growing our networks. We recommend the role of an instructional designer to anyone who is interested in the field, willing to develop themselves, and wanting to add to the profession.

Chapter 4
The E-Learning Professional

Carla Torgerson

Did you read the previous chapter and get excited about the possibilities of using your teaching skills to design instruction for workplace settings rather than a classroom? Do you also have strong technical skills—maybe you love to make killer PowerPoint presentations, create cool videos for your students, or find crazy ways to use technology in the classroom? If so, you should consider the rapidly expanding area of instructional design that focuses on using technology to teach.

I still remember lining my stuffed animals up on my bed and playing school as a child. When I was in college I explored many fields, trying to determine the best major for me. In the end, elementary education seemed like the most natural fit. I loved working with children and especially helping them grow and develop. When my undergraduate computer science professor suggested I had an aptitude for programming and encouraged me to consider that major, I quickly brushed her off, telling her that elementary education was a better fit for me.

In the middle of my undergraduate degree I had an opportunity to go to Australia, where I visited a K–12 school in the outback, in a rural area an hour or more from any major city. I was fascinated by how teachers from the nearest city were using streaming video to reach these small classes of high school

students. This was the early 1990s and they called it "telematics," but today we'd just call it distance learning or virtual instruction.

After I finished my bachelor's degree in education, I started teaching at a K–9 school for gifted children. Meanwhile I also started a master's degree in education, focusing on technology-based education. Little did I know that I was studying a field called "instructional design" or that I would come to blend the fields of education and computer science, becoming an instructional designer focused on instructional technology and e-learning.

What Is Technology-Based Instructional Design?

The influence of technology on instructional design and workplace learning has been growing significantly over the past 20 years. Some of the most common focuses of technically inclined instructional designers are:

- instructional technology
- the learning management system (LMS)
- e-learning
- virtual instructor-led training (VILT).

Let's take a look at each individually.

Instructional Technology

Much like K–12 environments, organizations will sometimes hire instructional technologists. These are people who keep an eye on the latest trends in technology and consider how to apply them to educational environments. They will also help instructional designers and facilitators use technology in their teaching. Instructional technologists are often involved in creating technology budgets, pursuing purchasing agreements, and providing technical support and other tasks involved in obtaining and supporting technology for live and virtual instruction. Depending on the size of the organization, such a person may also be the LMS administrator.

LMS Administration

Michael Long was a high school Latin teacher in Michigan. He loved the classroom but went into a corporate role because there were more career opportunities, better salary potential, and it was a chance to try something a little different. One of his first corporate roles was as the LMS administrator

in a large not-for-profit organization with more than 25,000 employees; he has since gone on to other roles and is now managing the implementation of training for a system-wide technology upgrade for that same organization. He did not need a computer science degree to be an LMS administrator; programming skills aren't required for that job, but you do need to understand how databases work and be able to think logically through problems. Michael says, "If you are the person that all your colleagues come to for help when using the class attendance or grade-tracking system, LMS administration might be a great fit for you."

Many K–12 teachers are familiar with using an LMS like Moodle or Blackboard. This is a system where you can post activities and assignments for students to complete, either before or after a lesson. Similarly, if you teach in a school that has laptops or tablets for every student, you may have a system for managing all the learning done on those devices. Even if you haven't used such a system, you are probably familiar with using a system to track attendance, post grades, and communicate with students or parents. All these systems center around a database that houses information about the student and the student's learning.

Corporate environments use a similar type of database-driven system. The corporate LMS will track who has signed up for classes, ensure those classes do not get over-enrolled, and send messages in advance of the class with information on how to get to the building or log into the virtual classroom. The LMS will also host any e-learning modules and keep track of who has taken which courses, whether they are live, virtual instructor-led, or e-learning.

The LMS is generally installed and maintained by the organization's IT department with highly technical staff, but a learning professional is usually in charge of providing technical support to instructional designers and facilitators, helping them to use it effectively. (If your school uses an LMS, this may sound similar to a role in your school district, too.) That person could also be fielding support calls from learners having trouble finding a course or who found they were not marked complete after taking a course.

E-Learning

If you are less interested in the LMS but love using graphics, PowerPoint presentations, or even videos to deliver instruction, you might really like creating

e-learning. Generally, e-learning is the term used to describe computer-based instruction modules that learners consume on their own time, without other learners present. This sort of asynchronous learning is used in lots of situations. In the K–12 area, you may have seen it used for remedial and extension learning, and for those students who need to learn in a different time or place because of personal circumstances. In the corporate world, it is used by large organizations when they need to train their employees on a variety of topics, but don't necessarily want to bring them into a classroom for that instruction.

The most common way e-learning is used in organizations is for compliance training. Nearly every company in every industry has some sort of compliance training that is required by law, and generally it has to be completed annually. Most of this is done with asynchronous modules that the employee can take on their own time. When I worked as an instructional designer in financial services, I took an annual course on how to spot when seniors were being taken advantage of financially and how to intervene. When I worked as an instructional designer in healthcare, I took an annual safety course intended to help keep me safe in our clinical environments. In both cases, these were 30-minute e-learning modules that I could take on my own, at any time before the compliance deadline. The training may not have been related to my exact role (I never moved money for seniors, and I wasn't a clinician) but as an employee of that organization I was required to take that compliance training every year.

Similarly, let's say the organization is implementing something new, like a new policy or procedure; if the content is short or straightforward it may not be necessary to schedule all the employees to come to live classes. For example, I recently created training for an organization that was changing its annual performance assessment process; we created a short, 10-minute e-learning program to explain how the process was changing and what this meant for both employees and their managers. There was no need to pull everyone into a live or virtual classroom for 10 minutes—this was certainly something that could easily be done in an asynchronous form.

Virtual Instructor-Led Training

Have you ever had a student who was home sick from school so you did a FaceTime call with the child or their parents to talk through a lesson? Or

maybe you've connected your class by video with another class in another state or country? If so, you've already been thinking like an instructional designer for VILT!

VILT is when we bring all the learners into a virtual classroom environment like WebEx, Adobe Connect, or even Zoom. All the learners are in their own locations, but log into an online site at the same time. The facilitator can still lead the instruction, showing visual aids and leading discussions and activities with the class. In some cases, you may even use video cameras to be able to see everyone's faces. Many teachers unexpectedly pivoted to this form of instruction due to COVID-19. Although it's also technology enabled, we don't call this e-learning—that term is left exclusively for asynchronous modules. We call this synchronous instruction *virtual instructor led-training*, or VILT. Sometimes learners will call these lessons *webinars* because they use the same technology to deliver the instruction, but there is an important distinction: Webinars are one-way communication with little or no participant interaction and VILTs use two-way communication with a focus on instructional activities and interaction between participants and facilitator.

For example, I recently helped design a VILT session for managers of pharmaceutical sales reps. Pharma sales are highly regulated and reps need to know their products extremely well; if they tell a doctor something that is incorrect about a drug, patients could die. So training for reps and their managers is carefully designed. In this case, we created a VILT session to teach managers how to use a new rubric to assess their sales reps as they role played a discussion about a new product. There were 16 managers across the nation, so we used VILT to train everyone at the same time and have discussion about how to best do the assessment with their reps. Since it was a one-hour session, it simply didn't make sense to fly everyone to a central location for the live class, so it was offered virtually.

Instructional designers who design instruction for classroom delivery may or may not teach the class themselves, and the same is true for VILT. In my example, I did not know the specifics of the drug or rubric well enough to teach the class, but I worked with those SMEs to design the PowerPoint and other visual aids, write the facilitator notes, and plan the instructional activities that would keep the learners engaged. Then one of the SMEs taught the class.

Are E-Learning and VILT Instructionally Sound?

Sometimes you'll hear people say that e-learning and VILT are "bad instruction"—that these mediums are just boring e-crap that learners endure to be marked complete on a learning module while no real learning happens. VILTs are assumed to be a "lecture-only" environment, and e-learning modules are expected to be the page-flipping equivalent.

While it is true that some e-learning and VILT classes are not well designed, instructional designers work diligently to use these mediums well. Just like there are bad teachers—those who don't care about their students and the quality of their lessons, or those who simply are not very skilled—there are also bad instructional designers who don't care about the quality of their e-learning modules or just don't have the skills to design good instruction. But these people are rare. For the most part, instructional designers of VILT and e-learning modules are caring educators who want to understand their learners and provide instruction that will help them perform better.

The Skills Involved in Designing E-Learning and VILT

If you are interested in designing and developing instructional materials, there are a lot of different things that those with education backgrounds can do, all with different levels of technical demands. You don't need to have a computer science degree or be able to build a mobile app to work in this field, but some roles will require more technical expertise than others.

Just like in your school district, you may do everything on your own, or, if you are in a larger district with more resources, you may have specialists who support you. The same is true of corporate instructional designers; you may be a utility player who does a lot of different things yourself, or if the organization is larger or better funded, you may have members on your team with specific expertise in certain areas.

As a teacher, you are most likely to pursue roles that are called "instructional designer" but the role may require some or all of the skills that follow. Unless you also have very specific skills with graphic design, programming, or project management, you won't likely pursue a specialist role in one of these areas other than instructional design. Here are some of the roles you may encounter in your career switch:

- **Instructional design:** The instructional designer will determine the flow of the instruction, figuring out the best way to teach the content using images, text, audio, and even animation, video, and activities.
- **Graphic design:** In this role you are creating instructional images, such as infographics or process images for use on PowerPoint slides, in e-learning modules, and even in instructional videos. You will also design the layout of those PowerPoint slides and e-learning screens, and possibly even the user interface for the e-learning program (all the buttons the learner clicks on to navigate the course).
- **Technical support or producer:** This role is specific to VILT. In this role you are participating in VILT sessions to provide live technical support so the facilitator can continue to teach even if someone is having technical difficulties. You may also work with the facilitator while planning the session to incorporate different student interactions that are possible in the VILT tool.
- **E-learning developer:** This role is specific to e-learning. In this role you are building the e-learning module with all its interactions and figuring out how to track any test scores or completion data. If you like building stuff on your computer, this could be a perfect role for you! In fact, for me, e-learning was how I really got involved in tech-based instructional design—not only did I like to teach, but I liked to build programs and use logic structures to branch that instruction in different ways.
- **Video or audio specialist:** Do you like to film and edit video on your phone? How about recording sounds for use in your e-learning programs? Then you're already doing audio and video work. In a lot of organizations, having an instructional designer who can do these sorts of things is a huge plus.
- **Project management:** Do you like to manage timelines, schedules, and budgets? In this role, you are ensuring that training materials are created on time by the people assigned to the project, and, if your organization works on cost recovery, that the materials are created within budget. Any time the instructional delivery has multiple people working together or longer timelines to get everything done, you will usually see a project manager involved to keep the project on track.

- **Subject matter expert:** You probably won't fill this role often, but with your subject expertise from the classroom you might. The SME provides content expertise and knowledge about the subject that you are designing instruction for. A lot of instructional designers will partner with SMEs from elsewhere in the organization to get a project completed. But if you already have that subject matter expertise, you may serve as the content expert, too. Think about the subjects you teach now, and if any of that is content that organizations could want to teach their employees.
- **Data analyst:** If you like spreadsheets and crunching numbers, this could interest you! This is a new role for most learning teams, but progressive organizations are beginning to include a specialist who can review performance data and learning asset usage data to determine where training is needed, the effectiveness of training materials, and so forth. Although this role is applicable to all types of workplace learning, it's most common with e-learning because it's easier for us to track how these materials are consumed.

Elisabeth Ulrich taught in an informal education setting. For several years she worked on a grant-funded project where she created STEM-focused curriculum and delivered instruction at Boys and Girls Clubs in North Carolina. She is now one of my colleagues at Bull City Learning, a consulting firm that creates custom e-learning, VILT, ILT, and other training materials for large organizations. She was recently promoted to junior instructional designer from production coordinator. In her production coordinator role, she worked with our audio talent and our graphic artists to ensure our course assets met the instructional objective. Then she sent those assets to the developer, or, if she had concerns, brought in the instructional designer. She also did QA (quality testing) of our e-learning courses to ensure there were no errors or bugs.

"One of the things I love most about working in e-learning is that I get to use all my talents and strengths every day," says Elisabeth. "I love to teach, but I also love to write, and while I'm not an artist, I love playing with graphics and fonts, too." Elisabeth studied both education and English and felt she'd have to choose to focus on teaching, or if she left the classroom, that she'd focus on writing. That's why she loves working in e-learning: "I never

realized there was a role where I could combine both teaching and writing," she says, "and also be able to use my artistic talents every day."

Working in e-learning really does enable you to use a multitude of skills because you aren't just designing a course or curriculum. You have to bring that instruction to life and generally that requires more than just working with text on screen. You need to think about the written word, but also graphics, and any audio or video and how they work together to augment instruction. In many roles you could actually be the one to create all the text, graphics, audio, and video. In our firm, we hire specialists for each of our roles, but that means Elisabeth is still looking at all those pieces, assessing how they work instructionally, and then working with graphic designers and other specialists to create just the right assets to bring the learning to life.

Elisabeth also said she likes working in a firm like ours because she has so much variety in what she teaches. It's one of the things I love most about working in a consulting firm, too. A lot of teachers teach the same grades or subjects year after year. There can be a lot of value in being able to get really good at implementing those lessons and teaching those concepts. But it can also get boring. In a firm like ours, our clients come to us with a multitude of needs, so I design instruction around a variety of topics. I recently worked on projects for managers to practice evaluating employee performance, to help marketers work better across internal marketing teams, to enable sales professionals to sell more effectively, and to teach people the technical details of hardware and software products. Elisabeth's list would be different, but it would be equally broad.

If you don't like that much variety, that's fine, too! Often, if you work for a large organization you will have a particular focus in the training you develop. For example, I once had a role where I worked to train call center representatives in financial services. Although the company had many product offerings, I focused specifically on training those call center reps who helped customers with day-to-day banking, so all the training I designed was focused on personal banking activities.

The Tools Used to Create E-Learning

If you have a technical aptitude, you have probably used a variety of tools to create learning objects for your students, and you know that some of these tools are purchased, while others are available at low cost or are free. In

corporate education, we have a similar mix. Some of the tools are similar to those you've used in K–12 education, and some are different, but the goal is the same—to use these tools to create instructional content.

Here are a few tools that are commonly used; you may see them listed in job postings or they may be discussed in interviews. Even the expensive tools often have a free trial period, so if you're serious about getting into e-learning, you should try them out—play around with making some instructional materials to practice using these tools while also building pieces for your portfolio!

- **E-learning development:** Articulate Storyline is the current industry standard. However, a lot of people also use TechSmith Captivate and Microsoft PowerPoint.
- **Graphic design:** Adobe Photoshop and Adobe Illustrator are the top tools used by graphic artists, but there are a multitude of similar products that are cheaper and generally less difficult to use. Some even have a particular focus, like Piktochart, which is used to create infographics.
- **Audio editing:** Audacity is very popular, but you may already have a free tool on your phone. Adobe Audition is another low-cost software application you can use to edit sound files.
- **Video editing:** Adobe Premiere is very popular, but there are many options available, and again, you probably already have an app you can use on your phone!

If you want to gain experience with these tools, or build up your portfolio, try creating some instructional materials for your current students. It will give you first-hand exposure to the tools while working on real projects. You can also get feedback from your students that will give you suggestions for improvement and new ideas to try, which will make these portfolio pieces even better.

My Transition From Classroom Teacher to Instructional Designer

When I was working as a teacher, we were experiencing massive financial cuts to education—not only were jobs hard to find, but there was also a government and public perception that teachers had a cushy job. Anyone who has been a

teacher knows what it feels like when someone says "It must be nice to have summers off." At that time, I felt so little respect for the profession of education, while I was also experiencing first-hand what it was like to be a teacher and put so much of my heart and soul into caring for my young students.

So I made a choice to pursue an instructional design job, which I knew would take me away from the classroom. It was a choice I struggled with for a long time and which I did not make lightly. But as someone who put myself so fully into my work, I didn't want to be in a profession which, at the time, was facing such weak public perception. I started by taking a job as an instructional designer at a college. I worked with faculty members to take their classes online, and to improve their teaching in the classroom. It was a perfect transition for me; I still had significant influence over a classroom environment and helped others improve their teaching, even though I wasn't the teacher myself.

While in that role, I learned that instructional designers are often used in corporate environments too. Until that point, I thought adult education was about colleges and universities—I really didn't understand there was a world of corporate training where my skills could be used. Then I learned about a consulting firm, Allen Interactions, that made computer-based training for large organizations. They were doing exactly the kind of things with e-learning that I'd studied in my master's degree in technology-based education but focused on adults in corporate environments rather than children in schools.

I often reflect fondly on the leaders at Allen Interactions who saw my value, despite my background in elementary and college education. They could have easily brushed me off as not having experience with corporate training, but they did not—and for that I will always be grateful. At Allen Interactions I flourished. In corporate training we are always trying to find ways to make training engaging and interactive, and in many ways, this was natural to me with my background in elementary education. When you are teaching a group of third graders, you always have to be engaging and interactive!

I was at Allen Interactions for nearly five years, creating interactive and engaging e-learning and digital training for large corporate clients. That time cemented me firmly in the world of corporate instructional design, and I have since worked on internal training teams for two large corporations and am now with my third consulting firm. I can say that for all those times when I wondered if I should really leave the elementary classroom, it

was a good decision. I love the work I do, and I am still teaching, just in a different way than my days in the K–12 classroom.

Basic Instructional Systems Design (ISD) Components and Models

While it is important to have instructional design skills, and you should be familiar with the tools to create e-learning, you should also understand the process that instructional designers follow when designing instruction. Particularly with e-learning it is important to have a common sequence of steps to follow; this enables you to create instruction more efficiently and also lets you collaborate more easily with others because there is a common understanding of the steps you are working on. As you saw in the last chapter, there are many models that instructional designers use to guide their work, but the most common is ADDIE. When working in e-learning, the SAM and LLAMA models are very popular as well.

ADDIE

The ADDIE model is used in all formats of learning design—face-to-face classes, VILT, and e-learning. When using this model, the steps instructional designers follow are the same, but sometimes the tasks will differ if you are working in different mediums, as shown in Figure 4-1.

After you've completed all the steps, the evaluation data should then drive improvements to the lesson. Traditionally, though, this is very lacking when we use e-learning. With in-person and VILT instruction, a good facilitator will intuitively recognize when something seems unclear or isn't working well, and they will want to fix that—no one wants to be in front of a group of participants, live or virtually, who are confused or frustrated, getting off track, or asking questions the facilitator can't answer. In this way, face-to-face classes and VILT classes are naturally iterated and improved over time.

Typically, when an e-learning module is complete, we put it on the LMS and have an annual update schedule. That means we can have thousands of people take the course before we look at any evaluation data or modify it. Obviously, this is not optimal, but it's a common shortcoming of the industry. This is why many people have gravitated toward the SAM and LLAMA models instead of using ADDIE.

Figure 4-1. ADDIE Tasks for Different Forms of Instruction

	Face-to-Face (F2F)	VILT	E-Learning
Analysis	• Determine the organization's goals or performance need, and if training will be the right solution. • Understand the learner: their past experience and knowledge, their motivation for this training, how it will fit into their workday, and so forth. • Determine the content needed to achieve the goals of the training.		
Design	• Determine the specific learning objectives. • Decide on the optimal format for delivering this training (live in a classroom, VILT, e-learning, or something else), likely length, location, and so forth. • Design the content and activities that will be used to achieve each objective, with a particular focus on the format chosen, length of time available, learner characteristics, and so forth.		
Development	• Create an agenda with timing for the session. • Identify how participants will be seated and other classroom logistics. • Create PowerPoint slides or visual aids. • Create handouts or other support materials. • Purchase any materials for students to use in activities (for example, markers, flipchart paper, activity specific tactile supplies).	• Create an agenda with timing for the session (this will generally be more specific for VILT than for an F2F class). • Create a PowerPoint deck, including slides to direct interactions and activities (this will often be more detailed for VILT than for an F2F class). • Create electronic versions of handouts and determine a plan for distributing them prior to or during the session.	• Create an outline or prototype of the module. • Determine the module's interface design (such as buttons the learner uses to navigate the program). • Write scripts for voice-over and onscreen text. • Create all images to support the instruction. • Lay out the text and graphics for each screen, building the course in a development program.
Implementation	• Enroll participants in the class (this is often done by self-registration on the LMS). • Book the classroom and arrange for any food or snacks; communicate location to participants. • Set up the classroom (chairs arranged, activity materials ready, handouts organized).	• Enroll participants in the session (this is often done by self-registration on the LMS). • Book the virtual classroom time and share the link with participants. • Ensure participants know how to use the required technology and they complete any required set-up prior to the session.	• Load the e-learning module on the LMS. • Test the module on the LMS to ensure it works properly and data or scores are being captured properly.

Figure 4-1. ADDIE Tasks for Different Forms of Instruction (cont.)

	Face-to-Face (F2F)	VILT	E-Learning
Implementation continued	• Conduct a "train-the-trainer" session if someone other than you will deliver the class. • Participants come to the classroom at the assigned time and the facilitator leads the class.	• Do a test session with the VILT facilitator to ensure all technology (virtual classroom, mic, video camera) is working. • Participants log into the virtual classroom environment at the assigned time and the facilitator leads the class.	• Register participants for the module (generally done automatically or by self-registration on the LMS). • Participants go through the module at their own time and pace, ensuring they complete it by the organization-imposed deadline.
Evaluation	• Quiz to assess knowledge acquisition. • Participant survey at the end of the class. • Facilitator feedback. • Manager or participant feedback once they are back on the job and applying the new skills. • Review of operational data: was the performance gap closed or were positive business results achieved?	• Quiz to assess knowledge acquisition • Participant survey at the end of the class • Facilitator feedback • Manager or participant feedback once they are back on the job and applying the new skills • Review of operational data: was the performance gap closed or were positive business results achieved?	• Quiz to assess knowledge acquisition • Participant survey at the end of the module • Review of course or learning asset usage • Manager or participant feedback once they are back on the job and applying the new skills • Review of operational data: was the performance gap closed or were positive business results achieved?

SAM and LLAMA

Two instructional design models, SAM (Successive Approximations Model) and LLAMA (Lot Like Agile Management Approach) were both conceived for e-learning design and are specifically intended to overcome the shortcomings of ADDIE that are due to having the evaluation at the end—particularly as it is applied to e-learning design.

The SAM and LLAMA models have all the same steps as ADDIE, they are just done in a different order to emphasize feedback and evaluation throughout the process. In both of these models, you do the same robust analysis as always, but instead of designing and developing the e-learning module to completion and then implementing it and waiting a year to make

any revisions, you use a more iterative approach. You do some design and development, create prototypes (rough versions of the course) and share them with others for review and feedback, and then you continue to do more design and development work.

In many ways this is akin to what you do when you deliver a live class for the first time; you facilitate the class, take in feedback, and use that to refine the class. When launching a live face-to-face class, many organizations have a "pilot phase" where they make significant revisions after each of the first several class offerings. SAM and LLAMA take this same sort of approach that is so natural to live instruction and apply it to e-learning design and development.

The Future of the Field

The marketplace for technically inclined instructional designers is growing fast in all segments of our industry—higher education, not-for-profit organizations, and corporate training. The global e-learning marketplace was projected to reach $107 billion in revenue in 2015 and those projections were realized. Current projections are for that to triple, growing to $325 billion by 2025 (McCue 2018).

This growth will come not only from more organizations embracing virtual instruction and those organizations that are already embracing it doing more with virtual learning, but also from the emergence of new approaches and technologies such as gamified learning, mobile learning, augmented reality, virtual reality, and other technologies that haven't even been invented yet.

As one would expect, the use of VILT and e-learning is growing rapidly in corporate settings. There are efficiencies of time and travel costs that simply cannot be ignored, especially as companies become larger and more geographically dispersed with employees working in different locations, in different time zones, and at different times of day.

According to an ATD research report on global learning and development leaders in 2020, 99 percent of organizations were using e-learning to some extent, and that number has likely grown to a full 100 percent since the coronavirus epidemic caused many people to work from home. Employees at high-performing organizations (defined as organizations that lead their competition in terms of financial performance, customer satisfaction, employee engagement, and growth potential) consumed an average of 11 or

more hours of e-learning per year, compared with six to 10 hours for all other organizations (Moore 2020).

Instructional professionals who can design and develop e-learning materials are likely to find a robust job market in large organizations (higher education, not-for-profit, and for-profit) and boutique consulting firms focused on e-learning design and development. Employment can be full-time and salaried, or you can be a freelance contractor, taking on project-based assignments and being paid on a fixed bid or hourly basis.

In terms of salaries, the average instructional designer salary varies widely based on the specific role (especially how technical it is), the industry sector, if you have particular subject matter expertise that helps you teach the content better, and geographic location. However, within that wide variety, in 2018, the average annual salary for an instructional designer in the United States was $84,421 USD and the average annual bonus was $4,394 USD, with an average manager salary being 20 percent higher than individual contributors (Smolen 2018). E-learning designer salaries have seen a steady upward trend, correlating with inflation, and actually growing at a rate slightly higher than inflation.

You can calculate your anticipated salary—influenced by a multitude of factors, including geographic area, level of education, years of experience and organizational sector—with The Learning Guild's Guild Research US Salary Calculator, available on its website.

Finally, it's also worth mentioning that people's job satisfaction in the area of technical instructional design and management is very high. In 2018, The Learning Guild found that 90 percent of respondents to their salary survey reported being "happy" or "very happy" in their roles. That is attributed in great part to the fact that these jobs tend to be pretty flexible. Because instructional designers are generally in the classroom less often, many are able to take time off, flex their work hours, and work when and where they want more easily.

What to Consider

"If there's a part of you that loves educating, but hates bureaucracy and classroom management, there's still a field for you. There is an opportunity to do all those things you love without doing all those things that you hate," says

Elisabeth Ulrich, an instructional designer at Bull City Learning. Elisabeth's current role is focused entirely on designing instruction for e-learning modules. Because she is no longer delivering instruction in a classroom, she doesn't have to do anything related to classroom management. And because she works for a smaller organization, she really doesn't have any committee work and doesn't have to deal with the politics or bureaucracy of a larger organization either. That's something I love about being in a smaller organization, too!

If you are interested in pursuing a role as a more technically inclined instructional designer, you should really consider what your strengths are and what you want to do all day. Different roles can require different combinations of skills, so you have lots of options, depending on your skills, interests, and personality style.

Your Personal Skills

First consider your technical skills. Do you enjoy tinkering with computers? Do you have a good head for logic structures and solving problems in structured ways? If not, VILT design and development is likely to require the least technical skills, although you will still need to learn how to use the virtual classroom environment. If you enjoy making things come to life on a screen, or programming, and thinking through if/then logic, e-learning design and development will be a good fit for you. If you like systems administration and working with databases, LMS administration will be a good fit. And if you love tinkering with the latest gadgets and applying them to education, you would be a great instructional technologist!

Next consider your level of extroversion. Many classroom teachers love that role because they are in front of a classroom of students every day. If you think you'll miss the student interaction a lot, then consider VILT, or a role where you do both face-to-face instruction and e-learning. An e-learning designer will generally spend their days thinking about what learners are likely to want, but not actually interacting with those learners. Of course, LMS administration will have no interaction with students, but you may offer technical support to those people having trouble logging in, finding their courses, having their completion marked properly, and a host of other issues. If you like working with people to solve their technical problems, LMS administration could be a great fit for you.

Also consider your level of attention to detail and ability to solve detailed problems. The more technical the role you pursue, the more these skills will be critical. Generally, the roles that will need these skills the most will be the LMS administrator and the high-end e-learning developer. In both of these roles you will find bugs in the system or the way you've programmed your e-learning, and you'll have to step back to think logically through what's going on to figure out what's going wrong and how to fix it. If you're doing LMS technical support or leading e-learning implementation, being able to also explain technical things to users in a simple way is important—these roles can be a great fit for teachers as they are so good at explaining difficult concepts to others.

Also consider your communication skills and ability to collaborate. Although there are many organizations where there is just one instructional professional who is taking care of everything—curriculum planning, e-learning design and development, LMS administration, and so forth—these people generally still work as part of a larger team within HR or an operational unit. And of course if you work on a larger training team you may work with other people who have particular talents and specialties that you need to capitalize on. Ultimately, instructional designers typically have strong communication skills and are expected to collaborate well with stakeholders and team members.

Some people may think these roles do not require creativity, but just like all teaching and instructional design, being able to consider new ways to teach a concept, and particularly how to do this in interesting ways with technology, is paramount to being an effective VILT or e-learning designer. For example, you have a VILT class with 100 participants; how are you going to engage them? Can you do an activity with multiple simultaneous chat pods? Or in an e-learning environment, how will you simulate the customer service experience so the learner can try things in a fail-safe environment? And can you really push the envelope by doing something with virtual reality or augmented reality?

Depending on the role you chose, you can have a lot of variety in the kind of instructional design tasks you are doing every day. This can give you opportunities to use a lot of different strengths, and potentially be in a role where you're using your greatest strengths most of the time, but also have opportunities to stretch and grow.

Your Professional Skills

As we've discussed, there are many roles you may fill:

- instructional designer
- graphic designer
- technical support or producer
- e-learning developer
- video or audio specialist
- project manager
- subject matter expert
- data manager or data analyst.

In very large companies or sophisticated consulting firms you will have specialists for each of these roles. Often that means your graphic designer will have gone to design school or your project manager will have particular project management certification. This can allow you to use the skills you have in these areas while working collaboratively with others who can execute at a higher level.

If you have a lot of these skills yourself, you may find that you really like a role on a smaller team. There are a lot of instructional designers who work in the sort of position where they fill most or all of these roles themselves. Many instructional designers create all their own graphics and program all their own e-learning. And if they are filling that many roles on a project, they are likely doing the project management themselves as well.

Which of these kinds of jobs you will like best—working with a team of specialists, or doing it all yourself—really depends on the skills you have, how much you want to specialize in instructional design, and how much you like collaborating with others to get things done.

Additional Job Experience

Like with all facets of education, effective instructional designers will say that their work is part art and part science. Unlike hard sciences such as structural engineering or molecular biology, there are people who are naturally good educators regardless of whether they've studied the field or not. While most public school K–12 teachers are required to take classes in education before they are permitted to teach in the classroom, there are no such restrictions on instructional designers. You do not need a graduate degree in instructional systems design to obtain jobs in this field.

In fact, there's a term some people use: the accidental instructional designer. This is the person who was really good at their operational duties and able to explain things well to others; over time they found themselves in a training or instructional design role, despite having no formal training in the field of education. As a result, many people work as instructional designers with a variety of academic backgrounds and degrees. The ATD *2019 Talent Development Salary and Benefits Report* found that the majority of talent development professionals (87 percent) had at least a four-year college degree, but less than half (44 percent) had a master's degree.

As a classroom teacher, your education coupled with your teaching experience will hold significant weight, especially if you are applying for jobs where you facilitate live or VILT sessions, or if your current classroom experience includes designing activities and lessons for your K–12 students. In addition, many classroom teachers in the U.S. hold master's degrees, and this will generally fulfill the job posting's educational requirements. Job postings that say they prefer a master's degree will generally be relatively flexible, considering favorably master's degrees focused in education, instructional systems design, human resources administration, and even business.

If you don't have an advanced degree in instructional systems design, you may want to consider things you can do to make your resume stand out when compared against candidates who do have such degrees. This is where professional certifications come in. Few job postings require a certification and they have negligible impact on salary (Bozarth 2018). However, they will give you an advantage against other candidates who lack these certifications. Certificates and certifications you may want to consider include:

- Certified Professional in Talent Development (CPTD) or Associate Professional in Talent Development (APTD) from ATD
- E-Learning Instructional Design Certificate from ATD
- Learning Design and Technology Certificate from Harvard University
- Graduate Certificate in E-Learning and Instructional Design from Northeastern University
- Certified Performance Technologist (CPT) Certification from the International Society for Performance Improvement (ISPI)
- Project Management Professional (PMP) from the Project Management Institute (PMI).

Certifications like these will generally require you to take some classes (often two- or three-day workshops with like-minded professionals), log a certain number of hours of work experience, or pass one or more exams.

Professional workshops can also enhance your resume. ATD has an immense catalog of programs, each ranging from a few hours to several days. Similarly, you can attend national conferences in the field—the most credible ones are from ATD, the Learning Guild, and ISPI, who all host several conferences each year, many focused on different areas of instructional design so you can pick the area that interests you most.

There are also numerous resources on the Internet regarding instructional design, professional trends, and how to use a variety of tech tools. Following professional trade organizations on LinkedIn and Twitter will direct you to blogs and other resources, as well as thought leaders and working practitioners who share their thinking and best practices in short videos, blogs, books, and other content.

Transferable Skills

As a teacher, you have a lot of transferable skills that make you a good fit for an instructional design role. Most important is your passion for education and helping people learn. That simply can't be taught and will shine through when you're talking with other instructional designers. You will fit in well with this new group of colleagues!

For Elisabeth Ulrich, who went into e-learning after working in informal education on STEM topics, the classroom helped her to develop strong teaching skills. She says that experience "helped her learn to explain difficult concepts in clear and succinct ways." Elisabeth believes that "delivering any kind of in-person education makes you more empathetic. You have to think about the learners' experience and consider how to design the best instruction for them." In the classroom, if a lesson wasn't working, she'd restructure it, either in the moment, or the next time she delivered it. That experience gave her tremendous insight into ideas and approaches that seemed to work and those that did not. She says this is invaluable to her as an e-learning professional because "you have more awareness of the ways the learning could be perceived—it helps you find the best solution for the most people."

With your experience in the classroom you know what it's like to teach, and how hard it can be to get in front of a room of different learners with different needs and try to change their knowledge, skills, and attitudes. The value of this cannot be overstated. If you are facilitating VILT sessions, you will never see the confused look on a participant's face, so having had that experience before will be immensely valuable. If you are working as an e-learning instructional designer, that experience will enable you to think about how the learner is likely to engage with your materials and how they will learn from them. It will also help you anticipate when people will likely have questions or lose focus on your materials. A lot of e-learning instructional designers do not have experience teaching live classes, and this will give you insights and perspectives they lack.

You also have a strong understanding of how people learn and how to design experiences to facilitate learning. You know what makes content clear or confusing, where questions are likely to come, how to address those questions well, and many other facets of being a good teacher. These are the same skills that instructional designers need. As a classroom teacher who has these skills and is surrounded by teachers all day, it's easy to overlook the fact that many people cannot explain things well to others. In fact, this is why organizations hire instructional professionals to help their SMEs create training materials.

Michael Long, the Michigan high school teacher now leading training for a system-wide technology upgrade, agrees that one of the biggest assets a classroom teacher brings is that experience of helping students learn. "Teachers have been embedded in that world so long, you may not even realize how important or powerful that is," he says. Many of your colleagues in workplace education will not have such a strong focus on how people learn, and you can bring that expertise to your team.

Michael also says that "classroom teachers become experts at managing the flow of energy—they don't get credit for being master facilitators." In a classroom you ensure your lessons build on each other, but in the corporate environment, you often have just one VILT session or one e-learning module, so you're very aware of the limited time you have. At every step you're thinking about every moment of instruction and making it engaging. "Teachers who've honed that skill in the classroom will do well in the

corporate world," Michael says. "If you think about how all students can be fully engaged all the time, that will serve you very well."

To me, it feels unusual for someone with an elementary education degree to be working in corporate workplace education. But I have always felt that my time in the elementary classroom is what sets me apart, even today. In the classroom I had to make learning fun, engaging, and relevant for my students all the time. In workplace learning, we can create weak instruction, and learners will politely sit through those classes or e-learning modules. In K–12 instruction, if you create the same weak instruction you will have classroom management problems—and a host of parents complaining. The experience and expertise that you have as a teacher is so valuable and will make you stand out as a strong instructional designer.

Despite all the transferable skills that classroom teachers have, a lot of instructional design managers don't realize the value that former teachers can bring to their team. Be sure to really reflect on your transferable skills. What can you bring from your classroom experience that will make you an amazing instructional designer? This will be important in helping you express to hiring managers the skills you have and how you will be a credible and valuable member of their team. Also, remember the guidance in chapter 3 about translating teaching terminology into ID terminology; using the language of our field will instantly set your credibility.

Seeking a Job

If you are interested in a role in technology-based instructional design, you should consider if you'd prefer to work in a for-profit corporation, a not-for-profit organization, or a higher education institution. All these types of organizations hire instructional designers.

It's natural to think first of the for-profit companies—medium- and large-sized organizations will often hire instructional professionals to assist with training their employees. In addition, consulting firms that create training materials for their clients hire instructional designers. You can work in a small boutique consulting firm focused on e-learning and training design, or work in the training area of a large consulting firm.

If corporate America isn't interesting to you, there are lots of not-for-profit organizations that also hire instructional designers. For example,

many governmental organizations, healthcare organizations, and charities and foundations are not-for-profit, but are also large enough that they hire people to assist with their training needs. In addition, a lot of colleges and universities hire instructional designers to assist faculty members in supporting their in-person instruction, designing course materials for their online offerings, and training faculty members to use current instructional technologies. These are generally not faculty positions, so you don't have the same academic requirements or challenges of being in a tenured position. I worked in such a role for five years, and I didn't need a PhD, nor did I go through the tenure review process.

The Learning Guild's annual salary and compensation survey also gives advice for people looking to enter the field or change roles within it. This report is a must-read for anyone interested in e-learning instructional design.

If you are seeking a job in e-learning design and development, keep in mind that e-learning designers can be pretty tech-savvy, so they are often engaged on social media platforms such as LinkedIn and Twitter. There are lots of great people to follow and groups to join, which will enable you to keep abreast of trends in the field. You'll even find that a lot of job postings are shared on these networks. Also, find where your local chapters of national organizations meet and attend their meetings if possible. Generally, these groups will share job postings at their meetings and on their job boards. Their national counterparts generally have robust online job boards as well.

What I Would Have Done Differently

I'm glad I made the transition from elementary teacher to corporate instructional designer. If I could do it all over again, though, I would not worry so much about what I feared I was leaving behind. When I chose to pursue an instructional design role, I knew that over time I would lose my teaching certification. If I wanted to go back into a K–12 classroom today, I would have to recertify. At the time that seemed like such a big decision—I feared that I would miss my students and that it would be impossible to go back to classroom teaching if I wanted.

Because I thought the decision was absolute, it was something I stressed far too much over. Now that I'm more experienced I realize the risk wasn't so great. I'm still creating instruction, and I'm doing it in a way that is very

technologically savvy. With all the focus on computers in schools, I know that I could return to the classroom if I wanted. I'd probably have to do some paperwork to recertify, but it wouldn't be that hard; I've been teaching for the past 20 years, just in a different way. Certainly, I'd need to be able to show an interview panel how those 20 years of experience make me relevant to a role as an elementary school teacher or technology coordinator, but I am certain now that my time away from the classroom wouldn't make me ineligible to return to the classroom like I had feared.

Remember that your career path is what you make of it. You can try an instructional design role and if you don't like it, you can always go back to the classroom—or even try something else. I can definitely say that the times in my career that I made the best decisions were when I had the courage to stretch myself and try something that felt risky or new.

Summary

I really love the work I do as an instructional designer focused on using technology to teach. I love working with clients to find the best ways to teach their employees new skills, particularly using technology in innovative ways. My SMEs are passionate about their content and helping to impart it to employees. With every project, the content I'm teaching is something new, which makes my days fun and interesting. And compared to my classroom teaching days, I still have robust conversations with colleagues about the best ways to teach, and my colleagues are still equally passionate about a job well done. Although we are not teaching elementary school students, we are training a company's workforce to perform optimally. And in the end that it still very important work that we all care deeply about.

Also, the field of technology-based instructional design is exciting because it's constantly evolving with new technologies and ways of teaching people. As corporations become larger and more global, the uses of virtual instruction will continue to grow, as will the opportunities within the field. In addition, jobs within this space pay well and have significant flexibility, making it an attractive career option for teachers.

Often classroom teachers that I talk to, especially those in K–6, will brush off their experience and skills and say that what they have is "not enough" to compete in the workplace education sector. But your background and expe-

rience are significant. You are creating meaningful education every single day. And you are doing it with a very challenging group of learners—far more challenging than your typical workplace trainees. This will make you competitive with any other instructional designer who has spent their career in workplace education. Your experience may be different, but it will make you a fantastic instructional designer!

Chapter 5
Serving Through Coaching

Barbara Egan

> "I am only one, but I am one. I cannot do everything, but I can do something. And I will not let what I cannot do interfere with what I can do."
>
> —*Edward Everett Hale*

People in education often want to be where the action is; they want to make a positive difference in the lives of others. When one has been in a field where service to others is a prime component, it is sometimes hard to choose a new field where one is not of service (at least, not in the way we're used to thinking). I chose coaching because I wanted to continue to be of service even though I was leaving the education field for "rewirement." It took a long time to consider retirement because I wasn't sure I wanted to take any more risks. Only when I realized that it was being in the arena that made life rich and rewarding for me could I consider a transition to my "third chapter." In my last position before rewirement, I was heavily involved in a leadership program. As young educational leaders moved through this program they would occasionally get stuck. They trusted that they could come to me for help to get past a tough spot. And as

business has evolved, working with capable educational leaders has become the majority of the work I do.

What Is Coaching?

Coaching is an emerging field that is well worth considering. According to the International Coach Federation (ICF), coaching is a partnership with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. Coaching is a client-driven process that is distinct from other service professions, such as counseling, mentoring, consulting, and training. The main basis for coaching is asking powerful questions to allow the coachee to reflect, take action, and grow.

> "I was often asked by friends and colleagues why I needed the training to be a coach when I had decades of experience as a school leader. The fact is, coaching is not just telling someone else how you did things as an administrator. It is acquiring the skills and techniques necessary to bring out each client's own wisdom and capacity. A coach is a skilled interlocutor who knows how to ask the important questions that lead to effective problem solving and decision making. It is a role that is fundamentally different from mentoring or advising, although there may be elements of both over the course of a coaching relationship."
>
> *—Fran Scoble, Former Teacher and Administrator Turned Leadership and Development Coach*

If you are considering moving into coaching, or just want to learn more about what it takes to be a coach, this chapter is for you.

Types of Coaching

The term *coach* is defined by *Merriam-Webster* as "one who instructs or trains." Probably everyone first thinks of a coach as a sports coach who essentially dictates the plays and tries to motivate the team and individual players. Coaches in the corporate world motivate and inspire employees, teams, and organizations to be better, learn from their mistakes, and grow in their professions and roles. There are several different kinds of coaching in the business world; here are some of the most common ones:

Career Coaching

Career coaches provide support for employees looking to make a career transition, whether short or long term, including guidance on their professional development and job search.They may help with resume writing, job searches, online profiles, and job interviewing.

Additionally, career coaching is often "stuck" coaching. People who are ready for a change or who have had change thrust upon them can get "career disorientation" or feel stuck and helpless. This disorientation can happen to even the most grounded and capable people. Sometimes all people need is a career coach to help get them unstuck. They may find research by the Gallup organization and Harvard professor Robert Keegan helpful.

Life Coaching

While they don't represent the most popular type of coaching within an organization, life coaches may still be present internally. This coaching specialty focuses on a variety of aspects of life, including career, health and fitness, finances, relationships, and spiritual growth.

Whereas many programs are available in schools to help children with learning differences, much less is available to the working adult who still has the same learning differences they had in school. Life coaching can make a significant difference both in college and for the adult in the workforce, helping people prioritize their work and growth with calendars, schedules, and a structured reminder program.

Organizational or Business Coaching

This type of coach provides business owners and entrepreneurs with support in identifying goals, creating strategies to obtain those goals, and boosting the overall performance of the organization.

Performance Coaching

This is coaching for those within organizations who need to improve their work performance regardless of level or job title, often as a result of performance appraisal results. Performance coaching has been used extensively as the last stop before an employee is terminated. Because of this use of coaching, many people are resistant to accepting a coach. This is much more prevalent in

for-profit companies than in education or not-for-profit settings. But coaches should be aware that there can be a negative stigma attached to having a coach.

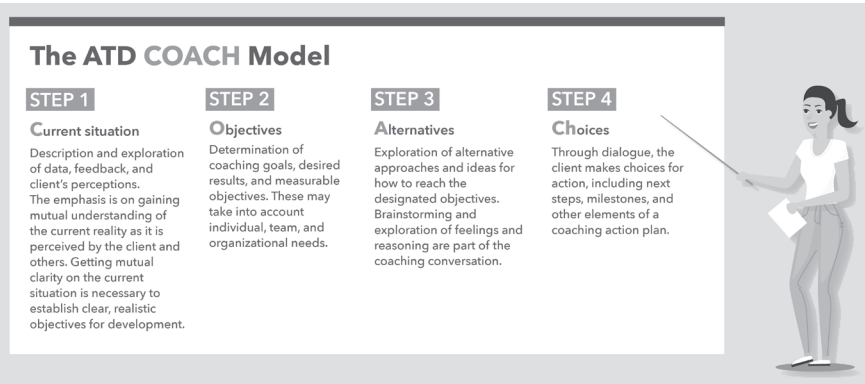
Leadership Coaching

This type of coaching supports those looking to grow and develop leadership skills, whether they are an individual contributor, manager, or senior manager. Leadership coaching can be a natural successor to career coaching and often becomes a positive step forward for someone who has become unstuck.

Coaching Models

There are several models used in coaching. While the ATD COACH model (Figure 5-1) continues to be widely used for coaching, many coaches have been using the GROW model since the 1980s in corporate settings.

Figure 5-1. The ATD COACH Model



GROW stands for goal, current reality, options (or obstacles), and will (or way forward). Other coaching models include FUEL; SOAR; Fierce Conversations; and Purpose, Perspectives, Process.

While GROW is exceptionally versatile, being adept at several models c an make you a better coach. Take the time to look up a variety of models to see what resonates with your style. Two of my favorite are Immunity to Change by Robert Kegan and the Gallup StrengthsFinder model. Figure 5-2 shows some other popular models.

Figure 5-2. Examples of Traditional Coaching Models

G Goals
R Reality
O Options
W Will

A Assess Situation
C Creative Brainstorming
H Hone Goals
I Initiate Option Generation
E Evaluate Options
V Valid Action Design
E Encourage Momentum

S Subject
T Target Identification
E Emotion
P Perception and Choice
P Plan
P Place
A Adaptor Action

G Goal
A Assessment
I Ideas
N Next Steps
S Support

C Current Reality
I Ideal
G Gaps
A Action
R Review

O Outcome
S Situation
C Choices or Consequences
A Actions
R Review

S Spot the Opportunity
T Tailor the Intervention
E Explain the Task
E Encourage
R Review

F Frame the Conversation
U Understand the Current State
E Explore the Desired State
L Lay Out a Success Plan

C Contracting
L Listening
E Exploring
A Action
R Review

P Preparation and Discovery
A Action
R Reflection and Insight
T Transformation
N New Possibilities
E Empowering Energy
R Results

C Clarify the Issue
O Open Up Resources
A Agree on the Preferred Future
C Create the Journey
H Head for Success

S Self Awareness
O Opportunities
A Action
R Review

Traditional coaching models can help us recognize some of the transferable skills between education and coaching. In the Figure 5-2, circle the areas that are strengths, and put an X by the areas where you are not particularly strong.

Fine tuning your strengths is important, but just as important is strengthening the weaker areas (the Gallup model disagrees with this; it focuses on strengths, believing that too much energy focused on weakness is a waste of time). The following valuable skills can be transferred from teaching to coaching. This is a generic list and not all may apply to you. You may also have specialty skills that are not included here but you should feel free to add them:

- **Review:** something that all teachers do regularly with classes. Get your students (clients) ready for the next step.
- **Reflection:** absolutely necessary for true learning. As a teacher, you have probably helped your students learn to reflect, especially on those wonderful teachable moments that happen quite unexpectedly. Your clients, too, will need guidance in using reflection.
- **Setting goals and objectives:** another requirement for a productive classroom and for helping clients.

- **Planning:** this is important, as is being willing to throw your plans out the window when necessary.
- **Taking action:** learning to assist others to create plans of action based on information, emotion, and culture.
- **Communication** to a wide variety of audiences.
- **The ability to say "I don't know" and "no."**

What to Consider

As John C. Maxwell, the noted author and speaker, says, "Change is inevitable. Growth is optional." If you are unwilling to grow yourself, this is not the time to consider coaching. Ask yourself these questions when considering a move from teaching to coaching:

- Do you really like being around children all day? If not, limit your coaching business to adults.
- Do you make enough money? Coaches don't necessarily make more money—especially at first and especially for those working on their own. There will be a transition period where your income is limited, maybe even less than what you make in education. If you want to be an internal coach in a larger business, don't leave teaching until you have secured your credentials and a new job.
- Are you tired of working on a shoestring budget? There is no guarantee that your budget will be bigger in coaching.
- Are you tired of schoolhouse politics? If you are going out on your own or in a smaller, boutique firm, you will leave most politics behind, but many of your clients will be in highly political arenas. You may need to help them navigate the tumultuous political landscapes where they live or work.

Future Trends

Coaching as a profession is in demand and the industry is predicted to grow. While in-person coaching is still sought after by many organizations, the shift toward delivering coaching on multiple platforms like video, phone, and email is increasing. Having a niche in corporate coaching or as a retirement coach will help you land a more profitable role, as will having the ability to coach not just one-on-one but to teams as well.

Transferable Skills

If you still feel like coaching is the right next step for you, here are some things that might help you decide if you are a good candidate and what education skills might be transferable.

Trust

In your classroom, the opening activities you do each year include many that help your students trust you. Each year is different, and you have probably modified activities to fit individual classes and the age (and maturity) group of the current year. Throughout your relationship with your students, you work hard to never betray the trust given to you. You need the ability to establish trust with your client and to create a strong two-person team set on creating something new. Think about your classroom or your current educational responsibilities. Do your students trust you? Do the parents of your students trust you? Do your colleagues trust you? Does your supervisor trust you? If you can answer yes to most of these questions, you are on the right path. If you can only answer yes to students, coaching may not be a good choice for you. In coaching, you are not teaching. You are a partner with your client, helping them to create change.

Building Partnerships

In addition to building trust with your students, you work hard at the beginning of the year to establish a partnership with the families of your students. This varies greatly from age level to age level, and by the cultural components of the community. The one thing that has shown to be a positive factor year after year in student achievement is the interaction and support from family members. Are you good at building partnerships, especially partnerships where leadership shifts from one individual to another? Can you name at least three strong partnerships you have created? If the answer is yes, coaching may be a good option.

Listening

Do you listen to the students in your classes? Are you good at decoding what they are saying? What students say and what they really mean are often two very different things. Listening to the parents in the student support system

can also be complicated, especially if you have indicated that the student is not where the parents believe they are or where they could be. From "my child cannot count to 10 at home, but the teacher says that she can" to "my child absolutely needs to apply to my alma mater for college," parents are frequently not articulate about their real concerns. Can you decode what they are saying? Can you ask the questions that get to the issues that really need to be discussed? Are you good at listening without bias? This is a hard thing to do. A good practice exercise is to work with a teenager. Listening to a teen and asking unbiased questions for clarity without judgment will give you great practice. You will know if you are successful if you don't make them angry. Ask three colleagues or friends about your ability for unbiased listening. This is a critically important skill in coaching.

Good Executive Functions

These skills are extremely important since you will largely be in charge of all you do. Did you ever have a summer when you spent extraordinary amounts of time creating something new for the next class only to arrive at pre-planning days to find out the district or the department had decided to move in a different direction? Did you ever have a class that just couldn't comprehend a lesson that you had taught many times before? In situations like these and in many other scenarios, you made changes, researched issues, and restarted from scratch. The better your executive functions are, the more likely you are to stay positive and focused. These functions include:

- organization and planning
- setting goals and prioritizing
- being flexible
- using reflection to help clarify goals and processes.

People Skills

If you truly do not like children or their parents, you have most likely had a miserable time in the classroom. Teaching is certainly not the career for everyone. Liking people and being willing to be of service to others before yourself are key skills in the classroom and in teacher conferences. You will need these skills in coaching, too. You will have to park your ego before each session. There are people who believe that being able to connect with a client is all

that is needed, but if you can sincerely like or want to assist someone, creating trust becomes much easier. Being curious about your client, and willing to accept cultural, regional, or ethnic differences, are both important to the job and your satisfaction with it.

Moving Forward

> "I left teaching about 20 years before I moved into coaching, so I came to coaching from administrative work. I was the director of a special program at Woodward Academy, which served students who learn differently, and I loved all aspects of the program—working with parents, teachers, administration, and students. But as the program grew, I had less and less time to work individually with students. As I approached retirement age, my passion for working with students grew to the point that I resigned from my job, retrained as a co-active personal coach, formed Ridgway Coaching, and became an LLC, and the rest is history. I have been coaching full time for 11 years, and I am confident that I made the right decision."
>
> *—Selma Ridgway, Former Teacher and Founder and Head of Ridgway Coaching*

Coaching takes commitment; the next section describes the skills I developed while deciding if I had the right stuff. All of these were necessary for me to become a good coach. To become a coach, you need to become an avid learner (again). As a teacher, you have probably done this multiple times as you adjusted to new standards or methods, or adapted your lessons to different learning styles. If you are a teacher who prefers and uses the "sage on the stage" method most of the time, you are probably not a good candidate for being a coach—yet. You can still acquire these skills too.

New and Necessary Skills

You will need to learn new skills, especially if you are going out on your own and hope to make a full-time living. Here are two important ones to get you started:

- **Business thinking:** If you are going to do coaching on your own, full-time as a consultant, you need to learn how to build a

business plan and a marketing plan. You can find lots of models and helpful suggestions online, but also look to a community or junior college. The professors in community college often work in their field, so they can provide not only "book learning" but practical experience, too.

- **Networking:** Learning from working professionals in the field who are teaching courses or giving short workshops has been one of my preferred ways of networking.

If you are still nodding your head, that's a good sign coaching may be the right career path for you. The next step is finding a coach for yourself.

> "I want to be in the arena. I want to be brave with my life."
>
> —*Brené Brown*

First Steps

Learn more about yourself, your strengths, and your insights. "Know thyself" is not something to be taken lightly if you want to be a good coach. Use the resources described in this chapter and in the appendix, get online, or go to the library if that is more your style. Dig out any old assessments about personality and strengths you have taken. Find a friend or two who will give you their honest opinions.

Starting with the familiar is less challenging. While I think I may have taken every assessment known to man, I started with the Gallup StrengthsFinder. This assessment gives you results without the jargon that is prevalent in many others. The explanations easily help you use your strengths and avoid the pitfalls. My top two signature themes are Maximizer and Achiever, which is roughly the profile of a bulldozer. In my school administrator and teaching jobs, these strengths helped me get things done (although finishing paperwork on time was never a strength).

People strong in the Maximizer role never wait until something is broken to improve it; they are always striving for new levels of excellence. This is all well and good, unless you are working with someone who has more of a restorative nature and who absolutely waits until something breaks, and then takes great pleasure in fixing it, often reaching new standards of excellence.

People strong in the Achiever role really need to get things done, often at the expense of people's feelings. Not a great attribute for a coach, I thought.

But learning about these two very strong attributes set the stage for thinking about how I could use these strengths in a coaching arena.

Reflection

Never underestimate the power of reflection. During my working years, reflection became a luxury; but time for reflection needs to be part of at least your weekly schedule. True learning does not happen without appropriate reflection. Recently while working with a client who lives near the ocean, I told her that her first assignment for the upcoming interim was to walk on the beach. It took a moment before her face lit up, a big grin crossed her face, and she said, "I can do that!" It was the first real smile I had seen in our session. She is now posting about her beach walking on Facebook and tagging me so that I know she is doing her homework.

Sometimes everyday life and its demands just need to be put aside to help us regain our equilibrium. So I challenge you . . . take time to create a period of reflection for yourself. If you are struggling with this concept, leadership coach Fran Scoble recommends *The Art of the Wasted Day* by Patricia Hampl. And Jack Mezirow (2000) reminds us: "A defining condition of being human is that we have to understand the meaning of our experience."

Being an introvert, I love taking time alone for reflection, but that would not be the right setting for extroverts. Fortunately, you can do reflection in groups. Think about something that made an impact on you this week. Ask: what happened? How did I feel about it? Did something happen that caused my feelings to change? If I felt differently or acted differently, could it have changed anything? You do not need to have an epiphany every time you take time to reflect. Just consider those questions and let it all go. Visualize those thoughts and feelings floating off into the air or the ocean or into an imaginary box that gets put away. Regular, reflective practice will change you.

Reflective practice is an approach used by many teachers. Experiential learning, project learning, chemistry experiments, and applied math are just a few areas that use reflection as a part of the process. An elementary teacher brings a class in from an outdoor experience and the first thing they do is discuss and reflect on what they saw and did.

Anyone who works with creative arts can relate to reflection as they paint over an almost completed canvas or rip out hours of work that just wasn't

right. In addition, regular reflection is not quite enough, and it behooves us to add mindful reflection to our daily practices.

Lifelong Learning

Be willing to be a learner again. You will need new skills to be a coach. It would have been easy to simply say that my Gallup StrengthsFinder profile was wrong for coaching, but my third strength is Learner, and that drove a wide-ranging search to find out how to use my strengths. Your top five StrengthsFinder skills reflect things you do well and methods that you tend to use often. I re-examined my Meyers-Briggs analysis, took the VIA assessment, and did a deep dive into those values. VIA is an assessment tool featuring character that differs from other tools in its focus. Like all the other assessments you can take, it gives you a different view of yourself and others.

A quick and easy values assessment is also helpful. Understanding your own values helps you live in an authentic way. Recognizing how your values differ from others can help you inspire others and create a mind picture for yourself of what it might look like to have different values. Values can also change as you grow and mature, so reassessing them is an activity that I find helpful to do every five to 10 years or after a momentous change in my life. Visit icarevalues.org/value_activity.htm and do the activity with a group or with students; then complete it yourself. Find your top five values.

One takeaway from reviewing the StrengthsFinder was to think long and hard about the Achiever aspect of my personality and teaching style. People strong in Achiever features need to accomplish tasks and strive to make things better. They never wait until something is broken to fix it. As a result of the analysis and with a little trial and error, I realized I shouldn't try to coach people who strongly believe that "if it ain't broke, don't fix it." So, I started referring them to several coaches I know who are very good with this restorative personality trait. It is important to remember that you cannot be all things to all people. As a teacher, you know you haven't reached every student; in coaching you will never reach all your potential clients.

Experience Coaching As a Client

Get a coach for yourself. And listen. It is important for you to experience coaching before you decide to be a coach. First, an internet search can reveal

the kinds of coaching that might interest you; go to 15 websites and read about what is offered or read articles online. Second, talk to friends and colleagues about their experiences with coaches and coaching. Get the names of coaches they have used, visit those coaches' websites, and if you can, call and talk to those coaches.

Either method (searching online or talking directly to other coaches) should generate more ideas and avenues of exploration. You will find people who give classes. You will find people who are coaches who can either take you on as a client or recommend a better coaching match for you.

Clarify your goal if you can. What do you want a coach to help you do? Remember, being coached will not be easy and it will not be comfortable. If it feels like a bad match, get a different coach. If it feels fun, warm, fuzzy, and not challenging, change coaches. A good coach will make you work hard, and it will not be comfortable.

I got lucky; my boss thought it was important for me to use a coach. I even picked one that he recommended. Did I worry that my coach might report back to him? Yes, until I met with the prospective coach. It is typical to have an introductory meeting to make sure that the partnership feels comfortable. It is important to feel like you can respect your coach and possibly even like them. When I coach, I want to make sure to work with people who won't make me impatient.

Feedback

In the coaching process it is important to learn to give and accept feedback, and it isn't always going to be positive or comfortable. Giving and accepting feedback is one of the most misused and underused communication skills. Some basic tips for giving feedback include:

- Feedback is about behavior, not personality.
- Make sure your feedback is clear.
- Feedback needs to be timely.
- Deliver feedback kindly.

And if you are the one receiving constructive feedback, keep the following in mind:

- Don't be defensive, but rather be genuinely curious about the feedback.

- Ask questions about the feedback to be sure you understand.
- Thank the person who has given you feedback.
- Be thoughtful about the feedback on your own—reflect mindfully.

Giving and receiving constructive feedback can strengthen a relationship and is a skill worth having in your toolbox. Teachers will appreciate RJ's struggle to be his best self in the Best Me I Can Be series by Julia Cook. The book on feedback is noted in the appendix and although simple has many basic truths about giving and receiving feedback.

Several of my early coaching clients have come back for course correction every couple of years. Sometimes they just need a conversation and an impartial listener. This aspect of coaching is incredibly rewarding. As a classroom teacher, I took great pleasure in any achievement attained by my students. It made teaching so very satisfying. When I went into administration, I lost a lot of that satisfaction and eventually started teaching one class a year or mentoring adults in the school in addition to my regular administrative duties. When I was examining coaching as a possible shift for myself, it was knowing that I had missed celebrating achievements with students or mentees that helped me believe that I really might like coaching.

Credentialing

Get a coaching credential. This is increasingly necessary in this emerging field, even though there are people who just hang out a shingle or create a super website. Having a credential boosts your credibility to potential clients, but that is not the only reason you should get one. A coaching program or two will help you establish depth. If you want to use just one methodology, a program will help you be able to "go deep" with your clients. If you want to use multiple methodologies, it will help you establish breadth with your clients. A good coaching program will usually require you to coach one or a few people over a period of time. You may finish coursework in a few weeks or a month, but demonstrating you can coach may take up to a year.

I chose to be a GallupStrengths Coach because the program was similar in many ways to the mentoring I was doing. I went on to study with Robert Kegan and Lisa Laskow Lahey at Harvard, authors of *Immunity to Change* (and quite a few other books). Kegan and Lahey are scholars and researchers, so their works are sometimes not the easiest read. However, Jennifer Garvey

Berger writes about this research in ways that are easy to understand. You do need to read Kegan and Lahey because their research is so thorough and so well tested; however, adding Berger's books to your must-read list will broaden your understanding of how to work with the concepts. *The Map* by Karl W. Kuhnert and Keith M. Eigel is a practical application using the research of Kegan and Lahey that will also help you understand the concepts. Until Kegan undertook the task of researching adult maturation, very little had been done on the topic. Now, many psychologists, thought leaders, trainers, and educators use this research. Take the time to explore this literature—you will not be wasting your time.

How do you find a coaching program? Ask friends, go online, read, and use your existing networks. Use your head to find the pros and cons. Then go with your gut! Combining these two approaches has proven to be incredibly powerful for me. I am logical, practical, and linear, and this gives the other half of my brain some say in important decisions.

What I Would Have Done Differently

If I could go back to give myself some wisdom now that I have made the transition from education to coaching and consulting, I might say, "Don't be so stubborn, of course you need to learn to do things differently." I was very successful as a teacher and an administrator and that meant I started this journey thinking I could do everything the same only better. Wrong! Let me say that again: I was wrong! If you want to make this move, you will need to acknowledge that not only do you have to get better at what you can already do, but you will also have to change how you think and do things. The coaching field is not an extension of teaching. If you are looking for an extension of teaching, it would be better to consider a tutoring business.

It's also important to stay true to the profile of people you want to help. I started by wanting to help educators get to the next level of excellence. At one point early in my coaching life, one of my clients persuaded me to take on her husband, who was also struggling. They wanted to meet with me together and separately. Because she was a good friend and client, I was persuaded. The arrangement was not particularly successful, however, and I quickly referred the husband to a colleague and I lost my friend as a client.

That experience also persuaded me that friends are not good clients for me. However, former colleagues have been my best clients and my best promoters. Yes, you will make some mistakes, but it will be important to learn from them. Reflection, in the case of failure or small successes, is a powerful tool.

> "The future belongs to those who believe in the beauty of their dreams."
>
> —*Eleanor Roosevelt*

Life Lessons Learned

Here are some of the essential lessons I learned from my transition into coaching:

- Gain clarity on what you want your career to look like. Take time to understand what your skills are and what brings you joy, then seek a job that enables you to leverage your gifts with purpose.
- To be an effective developer of people and to coach executives, you want to have some business experience behind you to be seen as credible. I have received this feedback consistently throughout my leadership and executive coaching career—my business experience helps take the coaching into deeper discussions around my clients' successes and challenges.
- Work on your inner critic. I allowed my inner critic to tell me I wasn't good enough, which significantly held me back from living my potential sooner rather than later.
- Understand that in a person's lifetime, research indicates that you will be laid off from your job at least once, if not several times. Build your resilience skills so that you can bounce back quickly and move on to your next chapter.
- Be OK with failure. This is where we learn the most! We don't learn when things are going smoothly.
- Be true to your values. Don't stay in a job where you are miserable or unhappy. There are so many employees who have "quit and stayed" and are disengaged. This not only affects the organization's success but can take a toll on your own health—both physically and emotionally.

- As a coach, you want to remain completely objective without judgment. Doing work on your inner critic helps manage your judgments about others and enables you to maintain an objective perception of others.

"If your job does not bring you joy every day, it's time to find a job that does."

—Dot Beinix, Developer of People and Executive Coach and former K–12 teacher

Summary

What will your next steps be? I hope that while I have answered some of your questions, this introduction to coaching has generated even more than you had when you started. Be fearless and ask your questions. If you know a coach in your area, take them to lunch and pick their brain. Get a coach. Be confident that you can make a positive difference to others.

Chapter 6
Consulting and Presenting: Focus on the Big Picture

Erik Palmer

Why do people become teachers? For the money? Of course not. Everyone knows that teaching is not a lucrative career. So what leads people into the profession? Cynics say it is an easy job, citing summers off and many breaks during the year, but anyone who has ever taught knows it is far from easy. Why teach then? I'll suggest this reason: the desire to make a difference.

I came from a career in business. I ran a commodity brokerage firm and traded on the floor of a Chicago commodity exchange. When my sons were born, I took an 80 percent pay cut and became a teacher. Part of the reason was because I had so much fun playing with my kids. My boys' laughter created more joy than making a successful trade in the soybean pit. Another big reason for my career change was because I thought making a difference in young lives was worth more than a big bank balance. Talking to many teachers over the years confirmed my belief that others also chose teaching out of a desire to improve lives: the English teacher who loves reading and believes that it will enrich student lives; the math teacher who knows that mastering math will make lives easier; the foreign language teacher who wants kids to be able to become world citizens; the kindergarten teacher who wants children

to know that sharing and caring are important skills, and so many others. While all teachers are responsible at some level for specific subject matter, most believe that it is not about the subject per se but rather about the positive impact on student lives.

For example, as an English teacher, I taught about comma usage. The point was not to teach comma rules, but rather to improve communication skills needed for all of life. There is a big difference between "Let's eat Grandma" and "Let's eat, Grandma." Teaching students how to avoid run-on sentences is about teaching them how to seem intelligent to readers. Future employers will not be impressed by "I think I would be good at this job I am hard-working." There is no prize for being able to state comma rules or correctly identify fragments and run-ons. The prize is being successful in life's communication tasks. Long-term, better communication skills lead to a better life. And I am willing to bet that any teacher reading these words will agree that their goal, too, is to improve lives. We look at a bigger picture. I talk more about that perspective later in this chapter, but know that focusing on the bigger picture will set you apart from many trainers.

My Journey to Training

My first job in the corporate world was to train the trainers at a Fortune 500 company. Not only were they adults, but they were also adult trainers. In other words, they were experienced at leading trainings and would be hypercritical watching me do my first session. I had a moment of panic. But then came the realization: As an educator, I learned things from other educators and allowed them to contribute to my knowledge. I went to conferences and professional development workshops, willing to find ways to improve my teaching. The people in the training room were really educators, too, anxious to learn something from me that would contribute to their knowledge. Just as I was looking for ways to be a more effective teacher in the school classroom, the trainers I was going to work with were educators looking for ways to be more effective in the training room. The game is the same. I was happy to be referred to as the SME, but really, I was still a teacher. (By the way, I had to look up SME when I started in this business—in teaching, no one referred to me as the subject matter expert, just the science teacher.)

Specialist or Generalist?

In the world of education, there are two categories of K–12 teachers: specialists and generalists. In elementary school, each teacher is responsible for several different subjects. Because I started teaching fifth and sixth grades, I taught English, science, math, and social studies. The essential skills needed for the generalist role are the skills of communicating, conveying information in appropriate pieces, and controlling behavior, and those can be applied in any curriculum. In elementary schools, you don't have to be an expert in any subject. I learned enough about electricity and magnetism to be able to teach the basic concepts to my students; I learned enough about Colorado history to help students understand a bit about the state's past. I was a generalist, like all teachers in early grades.

In upper grades, that changes—you have to become a specialist. Having classroom management skills and general knowledge are not sufficient for teaching Advanced Placement Calculus. Teachers are grouped by specialty: English department, math department, and so on. When I moved to upper grades, I was a civics teacher and a member of the social studies department. I had to become a subject matter expert.

I discovered that the same two categories, generalist and specialist, apply to educational consultants and presenters in the business world as well.

The first thing I did when I was thinking about moving into the corporate world was attend ATD's international conference. I wanted a sense of who talent professionals were and what they did. I attended sessions looking not only at the presenters but also at the attendees. I eavesdropped on conversations about challenges and expectations. I interviewed people sitting at the lunch tables. Discovery number 1: Some organizations are large enough to have their own staff of presenters and instructional designers; smaller businesses bring in professionals from the outside. Question number 1 for me to think about: Did I want to join the team of a large corporation or did I want to solicit business from many smaller companies?

Discovery number 2: There are generalists willing to tackle varied tasks and specialists who focus on one task. In the first instance, consultants sell their general skills. They are good at designing and delivering instruction, and if you give them the content you want covered, they will present it. One woman I talked to, Jean, had facilitated workshops about generational

differences in the workplace, harassment prevention, and time management. Give Jean enough lead time and she can present about any topic. She is an expert at training—a generalist, not a SME. Jean doesn't stay on top of any particular content such as health and safety regulations, dental implant technology, or digital speaking tools.

On the other hand, some consultants sell their expertise in one area. I talked to Dan, a trainer and an expert in all things related to electrical utility poles. Setting transformers up on the pole, setting distribution and grounding wires, and performing pole-top rescues in case of worker injury were his wheelhouse. Dan is a SME, a specialist, and not particularly well-versed in learning theory. Question number 2 to think about: Did I want to be a learning consultant willing to teach any content or a subject matter expert?

The line is a bit blurrier than I have suggested. That is, you could be a SME about a general area. Many trainers end up as educators because of on-the-job competence—"You are an excellent electrician. You are now in charge of training the apprentices!" People in situations such as those know how to do something well but may not know how to successfully teach others how to do it. This opens the door for experts in the field of how to teach, which is an enormous area. How should you design instructional materials? Should you incorporate gamification? How do you create successful microlearning videos? What digital tools are suited to which learning outcomes? Which learning trends are fads and which have long-term potential? In other words, you can be a specialist about learning in general. You stay on top of learning trends and instructional delivery strategies to show others how to effectively teach. You can teach SMEs how to be more effective deliverers of knowledge.

What Is a Consultant and Presenter and What Do They Do?

Every business you know uses trainers. I hadn't thought about that before I moved into adult education. Your dental hygienist needs classes to maintain certification. The sales staff at the clothing store gets trained in how to fold sweaters and how to upsell. Someone at the airport trains the people who drive luggage carts, snowplows, and fuel trucks, operate the jetway, and guide an airplane to the gate. Registered nurses and certified nursing assistants get trained in how to help patients avoid bed sores. The barista is taught how to

make a flat white, a cappuccino, and a nonfat, sugar-free, almond milk, hazelnut, extra-hot latte. The restaurant staff get trained about food storage safety and how to avoid food-borne illness. Someone is responsible for training the office staff about sexual harassment in the workplace. The sales team learns about the latest, most effective ways to close a deal. Company regulations and rules are taught.

In short, trainers and training are everywhere. To say a bit more about dental hygienists, when I asked Yolanda, my hygienist, about her experiences, she told me about the meetings she attends twice a year. The general sessions feature presenters who talk for an hour or so about topics of general interest. Then consultants come in to lead the specific, three-hour classes she needs to take to acquire professional development hours to stay licensed in Colorado.

I do both roles, speaker and consultant. I often speak at conferences, which can lead to getting consulting work in training environments. In both instances, you are considered the expert in the field, giving advice on some aspect of training or talent development. While acting as a consultant, you may spend a good deal of time with an organization and their learning team to offer advice on how to change or make more efficient the practices or processes of that organization. When you are presenting, you are usually only at an event or organization for a short period of time delivering your ideas on a topic to a mix of people from different organizations or roles. Usually, consulting is a more involved process consisting of regular, steady work if you find the right company. First, however, you have to find your niche.

Finding a Niche

I was comfortable teaching multiple subjects in the school setting, and if you are too, you may want to present on whatever topic the client needs. In that case, be a generalist. Although I was comfortable being a generalist, I chose the SME route, and I present about oral communication skills. The topic is a bit broader than what we think of as public speaking in that I am concerned about all types of oral communication: one-to-one, small group, large group; formal and informal; and in person or via digital tools. I don't venture outside that area. I believe that to effectively convey information and get it to stick demands strong speaking skills, and I work exclusively on that aspect of training. Yes, I am arrogant enough to think that I could do a good job presenting

about business writing, but I don't tackle that topic. (And there are some topics I know I could never teach—see pole-top rescue.) I study oral communication, read books about oral communication, watch speakers, check out other experts who present about speaking, and do everything I can to develop expertise on that content.

Where do you fit in? Look at the Job Outlook by the National Association of Colleges and Employers (NACE). Each year, NACE surveys a large number of employers to assess what jobs and skills are in demand. I have studied the report for years. Look at the top hiring categories. That tips you off to the professions that are most in demand. Some require hard skills specific to the particular businesses (such as wiring alarm systems, operating a forklift, or computer programming). Look at the list of top skills employers seek. These are the soft skills useful in any business (such as communication, collaboration, time-management, or leadership). Do you want to find a fast-growing job segment, target that industry, and teach a hard skill? Or do you want to find an in-demand soft skill and target that instead of a particular business? I chose the latter.

What Teachers Do That Consultants Don't

The public thinks of teachers in front of a class leading a lesson. The public doesn't think much about the preparation needed before teachers get up in front of the class: figuring out what lesson is needed, designing the best way to deliver the lesson, creating visual aids, planning the right amount of instruction to fit the time, and perhaps thinking about how to handle distracted or disruptive students. All of those apply to my job as a consultant and presenter. Even distracted students? Yep. Not everyone in front of me is excited about being there. People who have to attend because the boss requires it or they have to earn recertification credits may be unenthused. While not openly hostile, they may present the same kind of challenge that your less-engaged students did.

The public also doesn't realize how much work goes into the teaching profession outside the classroom—tasks like conferring with parents, creating and grading exams, writing report cards, monitoring the hallway, going to faculty or department meetings, calming upset students, running active shooter and fire drills, and much more. Consultants do none of those, and in truth, I'm happy every day about that.

The lack of grading is the most significant job difference. With students, you track progress over a long time. There are frequent assessments and readjustments to how you teach based on those assessments. Talent development consultants generally do not have long-term relationships. I come into a situation, do my job, and leave. The company may have the learners fill out a simple evaluation about me and the training—my goal is all smiley faces circled!—but there is not usually a follow-up to see if the attendees got anything from the presentation. Was there a positive behavioral change? Remember that my goal as a teacher was to change lives. I could see the growth from September to June and knew I had an effect. I don't know if there is an effect now.

This can lead to learning consultants becoming information dispensers. In leading a session about generational differences in the workplace, a consultant will present a lot of facts: Millennials tend to think _____; Boomers tend to think _____; Gen Z believes _____; Gen X is good at _____. While this information may be interesting to many, the bigger picture is missing. How will this make lives better? How will this make the workplace better? Typical attitude: I won't be around to see the impact (or lack thereof), so I'll dispense my information and move on. In adult education, there is a need for educators who value the big picture and address the big questions.

Transferable Skills

In thinking about professional trainers, I imagined very slick motivational speakers. Tony Robbins is a trainer, isn't he? Actually, no. While, as you may guess, I believe strong speaking skills lead to more impactful learning, top motivational speakers are not my competition. As I mentioned, many learning specialists are regular folks who were good at their job and ended up training others. In many regards, they are behind the curve as educators. In getting my teaching license, I took more classes about how to teach than classes about subject matter content. I wasn't learning about science topics, for instance, but rather about teaching methods. The assumptions were that I either already knew my subject matter or could easily learn it but that I didn't know how to teach that content. Those assumptions were correct. And once hired? My district offered in-service professional development often. Experts came in to give us tips about how to teach better: how to incorporate digital tools, how to

reach tough kids, how to differentiate for different types of learners, and so on. Your experience was no doubt similar. You likely have a collection of strategies that will directly transfer from your teaching experience, including how to:

- Connect with the learners.
- Link new information to past learning.
- Chunk information into manageable pieces.
- Vary delivery formats.
- Implement gamification.
- Incorporate problem-based learning.
- Set up reciprocal teaching.
- Include think-pair-share activities.
- Facilitate cooperative learning.
- Use role playing.
- Add appropriate technology.
- Manage a classroom.

All of those how-to-teach classes were valuable, as it turns out.

In the world of training, the assumptions seem to be that trainers know the subject matter and already know how to teach it. However, that second assumption is incorrect. Trainers are not confident that they know how to be effective educators and are extremely interested in learning how to become better. They are hungry for lessons about how to be better instructors because they did not get the pedagogical guidance teachers got. I was also surprised to find out that corporate educators are actually behind the curve in using technology. I expected slick training rooms equipped with the latest technology and trainers with sophisticated methods and massive digital skills. In retrospect, this was foolish. How many teachers in my school were digitally astute? Only some, in spite of the fact that we had all the gadgets and many opportunities to get help in using them. If you were in the tech vanguard in your school, you will be in the vanguard in the corporate world. Microlearning, video lessons, and online classes are hot topics, and some teachers have been designing for these types of instruction for a while.

The Biggest Changes

I've hinted at one of the enormous differences between K–12 and the business world: focusing on the big picture versus focusing on dispensing

information. You may have heard students ask, "Why do I need to know this?" Hopefully, you had a good answer. It likely involved pointing out that at some point, the students' lives would be better for having known the information. You would be back the next day, and the next, and would be able to see the learning being applied.

A large problem with training is that learning consultants are brought in to address a trendy topic. I'll continue to pick on the training topic of generational differences in the workplace—attendees at that workshop will reasonably ask: Why do I need to know this? How will this make the workplace better? Was there a problem? Does this information solve that problem? For the SMEs who present about this topic—how to deal with five generations in the workplace—none of these questions matter. They come in, do their presentation, and leave. They don't analyze beforehand whether the presentation is needed and don't hang around after to see if it mattered. They do what they were asked to do. Job done. On the plus side, this makes life easy for the itinerant learning professional. On the minus side, the sense of making a difference can be lost and an I-don't-care attitude can sneak in. In the first case, you won't know the answer to these questions: Was what I did important? Did I have an impact? Did I solve an important problem? In the second case, the lack of caring may contribute to the negative perception of training. The old teaching adage applies: No one cares what you know until they know that you care.

Another huge difference is the lack of connection with the learners. Think of your favorite teachers. Do you remember the specific lessons they taught? Probably not. You remember the people, the connection you had, and how comfortable you felt in the classroom. And as a teacher, you had 180 days to build a relationship with each student. It was critical. It helped students believe in you so you had credibility when you said, "This is important." The relationship made them want to impress you. The relationship was motivating. That connection does not exist in the learning specialist world. When I fly in, I am an outsider. There is a level of suspicion. Other training programs weren't so great, so why is this guy different? He doesn't know what I do every day and doesn't know anything about me, so why should I listen to him? There is effort involved in overcoming these perceptions. Yes, you can have an I-don't-care attitude because you aren't hanging around for long, but I don't think like that. I still want to make a difference.

Skills You Need

The bar is low. I mentioned before that most of the people I ask about their past experience with training sessions report being unimpressed. I understand why. I tell this story in my communication skills class and want to share it here.

Before making the move from public school to corporate presentations, I went to a large company to observe a training program. The company had its own training department with a staff of leaders to train the trainers, in-house trainers assigned to various jobs around the company, and an instructional design department. The head of training decided that all trainers needed help with instructional methods and designed a class to show them different instructional strategies. He sent his ideas to the instructional design department to prepare a PowerPoint for him. Big money company, top-notch and well-meaning people with a noble goal—what could go wrong? To many in the class, nothing did. Everything looked normal. But as we now know from talking to trainees across the board, normal is hated. We are all sick of PowerPoint slides as we know them. Over 10 years ago, a corporate comedian named Don McMillan made a routine about horrid PowerPoint presentations (see "Life After Death by PowerPoint"), but we still suffer death by PowerPoint everywhere. Crowded slides, bullet points with complete sentences next to them, a cute picture in the corner of the slide—boring! And this horrible habit is even more deadly in a long training session.

The California Department of Education required the use of a template they created for a two-day training I attended. I saw essentially the same slide over 500 times during the workshop. With these experiences in mind, I spent some time studying how to create effective slides and raise the bar. I like to break the mold. For example, there is never a bullet point in any presentation I do, and no one has ever complained about that. I learned how to make visually stimulating slides.

Boring. That is the number 1 word I hear when I ask people to tell me about the last trainer they saw. Yes, some topics are not exciting, and few are inspired by Universal Precautions for Dealing With Bodily Fluids in the Workplace, for instance. Even so, most of the boredom comes from poor speaking skills by the presenter. ATD asked me to write the book *Own Any Occasion: Mastering the Art of Speaking and Presenting* because they recognized this problem. How many speakers can command attention and interest for an

hour? Two hours? Four hours? Not many. And when instruction moves to the digital world, poor speaking is an even bigger issue. On a small screen and through a small speaker, verbal messages lose much of the impact they might have had if delivered in person. Combine that with the distractions present while viewing online instruction, and weak speaking makes learning impossible. Improve your oral communication skills to stand out from the crowd. Be careful, though. There are literally thousands of books with public speaking tips. Don't get overwhelmed. Most of them are disorganized and each has different language (for example, inflection, vocal modulation, enthusiasm, expression). As I wrote in *Own Any Occasion,* all speaking includes two basic parts—what you do before you speak, and what you do as you speak. Be honest with yourself. Are you good at designing lessons and creating materials but not great at presenting them well? Are you a top-notch speaker but your materials and lessons are weak? Find sources that address your biggest challenge.

Market Research and Job Growth

There are trainers in every business. You'll start noticing their reach. I looked on the wall behind the counter at the fast-food place where I had lunch and saw a poster about PLS. I don't remember what the letters stood for but knew that everyone had been trained in this new customer service method. You'll find evidence of training everywhere you look—and much of it is done by consultants. There will always be a need for teachers, and there will always be a need for trainers. According to *Training Industry* magazine, $166.8 billion was spent on training in North America in 2018, a number that has grown steadily. Spending on outside services grew from $7.5 billion to $11 billion and training payrolls increased 13 percent.

The market is also changing. Just as technology has disrupted newspapers and retail stores, it is disrupting training. There may be a move from in-house training to outsourced training. Why have my own training department when everything is available online? Why have an internal training department when I can find learning specialists online who can come in and do the job? (Bersin 2017). As the training payroll number indicates, this hasn't happened yet, and businesses are still hiring instructors. Still, there has been a move away from in-person training to digital training, and the e-learning market is predicted to explode (Global Market Insights 2019).

Some of the move is fad driven: People love their smartphones! Let's make little videos for them to watch! To be sure, some instruction should be moved online, and there is a place for e-learning. Trivial lessons can be moved to the point of need: How do I void a sale? Here's a quick how-to lesson. People who can design this type of instruction are needed, especially people who can make microlearning watchable instead of painful. Not all instruction fits into microlearning or virtual learning, however. Teaching interpersonal communication skills, for example, requires personal contact.

Breaking In

Because I came from business, I was more comfortable making the change than someone who has spent their entire career in public education. Significantly, I had an interim step: I trained teachers. While teaching, I noticed that there were no materials available about how to teach students to speak well. My school had a spelling program, a grammar program, a basal reader, a math program, and so on, but no speaking program. I developed a framework for teaching students how to be better oral communicators. Then I began speaking at conferences, starting with local chapters of educational associations before moving on to bigger conferences.

At a talk I was giving, an administrator asked if I would lead a workshop about how to teach public speaking for her district's professional development day—my first-ever training job. Seeing a need and an interest in the topic, I wrote and self-published a book. Stenhouse Publishers, a major educational publisher, heard about the book and agreed to publish an improved version of it. More calls came in to lead professional development, more conferences accepted my speaking proposals, and I ended up leaving the classroom to speak full time. You may also want to make similar interim steps: Speak at associations in your field—local chapters of the National Association for Social Studies or the International Literacy Association—and lead professional development in your district. Get a feel for speaking and presenting to adults and get experiences to add to your resume. If you have a niche, consider writing a book. A self-published book costs money and will not be a bestseller, but it offers credibility. Think of it as an expensive but valuable business card.

Subscribe to industry magazines (*TD* or *Training Industry*) and join their associations. Look into certifications offered by the training organizations who

publish the magazines. ATD, for example, offers certification options and one may be germane to your desired track. Build your confidence and expertise while building your resume. Find organizations of trainers such as ATD, SHRM (the Society for Human Resource Management), and Training Industry. Apply to speak at their events. Attend the events even if you are rejected as a speaker; you can see what's happening in the industry and see what kind of proposals were accepted so you can create a better proposal next time.

Join local chapters of training organizations. I did a web search for "training industry chapter in Colorado" and found many options, some specific to certain industries (for example, disaster preparedness or construction) and some more generic (Northern Rockies Chapter of the Association for Talent Development). Network with chapter members. Find a speakers bureau and apply. I am in the stable of consultants at Zoe Training and the Denver Speakers Bureau. These bureaus have agents with established clients who may call and say, "I need a training about communication skills." The agents take a percentage of the speaking fee but may find you jobs you would not otherwise get.

Create an online presence and join LinkedIn. A large corporation found my son-in-law through LinkedIn and hired him to be a training manager. Two years later, he switched jobs when another company found him online and made him an offer he couldn't refuse. Create a website. True, everyone has a website, and few will find yours. You don't have to be at the top of the search results, but prospective clients or employers will expect to find you on the web. Include videos of yourself presenting. If you can't get a video from a live event you led, simulate an event. An e-learning trainer should have an e-learning example available online. Create a Twitter account and follow relevant accounts such as the International Society for Performance Improvement, the Project Management Institute, and the Learning Guild. Participate in their Twitter threads. See what topics are hot and read the articles posted so you can stay on top of trends and appear to be up to date. Watch any free webinars that are mentioned to see what is being done. Just as schoolteachers have specific jargon, so does the training world. Learn the jargon.

Hot Tips

In a sense, people don't grow up. The kid who couldn't stop talking in sixth grade is still a big talker as an adult. The student who hated icebreakers and

group work is likely an adult who hates icebreakers and group work. Don't expect very different behaviors from grown-ups than you had from children. You hope they'll keep their gum in their mouths. But most importantly, the kids who asked "Why does this matter?" have become grown-ups who will still demand to know why your training is relevant. Indeed, relevance is even more critical now. The people in front of you have interrupted their workday to see you. They have inboxes to deal with, paperwork to address, customers to contact, product to move, food to prepare, and who knows what else. Understandably, they have little patience for presentations that will not help them on the job or help the bottom line of the business. Make sure you always focus on the big picture: making their lives better. If you can't demonstrate how what you are sharing makes an immediate positive impact for attendees, expect a cool reception.

Look at your presentations with new eyes. There is a standard that we all expect and accept. The top names in education present at top-level conferences, and we all know what the show will look like. You can visualize the slides and hear the voices right now, can't you? Don't follow the standard. My daughter, a registered nurse, was asked to teach certified nursing assistants and other nurses about pressure-ulcer prevention. They gave her the old slide deck that had always been used. No one would have found it unusual had she presented it, but she showed it to me. I invited her to look at it with new eyes: Is this stimulating? Impressive? We rebuilt the presentation, and it was an enormous hit. Though new to the profession, she was invited to be a preceptor, a combination nurse instructor, supervisor, and mentor. You can get away with normal, but don't do it.

Future Trend

Actors will enter the e-learning world. Perhaps not Hollywood actors, but consultants and speakers who can impress on screen. As more and more e-learning is developed, more and more dreadful, hard-to-watch videos are created. SMEs talking at learners doesn't work. Training companies will hire "training actors"—top-notch presenters—whose only job will be to perform the content that fell flat when delivered by the SME. Look for a new type of consultant, the onscreen talent person. A subject matter expert will create the content, an instructional designer will storyboard the video, and the talent will come in to perform.

Consultants will offer in-person presentations with digital follow-up. The personal touch is critical for gaining buy-in, but more important, behavior-changing learning does not come from one-and-done training. Look for consultants who can impress in a training room and then offer impressive ways to monitor the learners' progress digitally. Using platforms that allow the instructor to observe the trainees, offer feedback, and interact online will soon become the norm.

What I Wish I Had Done Differently

Avoid the mistake I made—feeling like an impostor. Many teachers have an inferiority complex. We say things such as, "I'm just a teacher." We think that businesspeople have real jobs and command more respect than we do. That attitude holds you back. You have something valuable and needed, don't you? You should have a superiority complex! Years of experience teaching puts you ahead of most learning professionals. If you are an exceptional teacher, you'll be an exceptional talent professional.

Summary

Where do you want to go with your new career? Certainly, the safer bet is to join an established company's training department. Striking out on your own is possible, but don't kid yourself—building a business is tough. It is a trade-off between security and independence. The final question to ask yourself is not "Can I do this?" but rather "Am I an educator or an entrepreneur?" Educators can become instructional specialists as employees of established businesses; entrepreneurs can become independent learning consultants. Either way, here's the bottom line:

- There is a market for your skills.
- You have experience that is relevant.
- You can move from educating children to educating adults.

It's just a matter of deciding how and when to make the move.

Chapter 7

Academia: Higher Education's Risks and Rewards

Charles Steven Bingham

Higher education was not my first, second, or even third career. Having retired from a highly compensated job with the state of North Carolina at age 59, after more than three decades' contribution to its retirement system, I had financial freedom. Thus, my risk was nothing compared to a mid- or early-career professional aspiring to a job that may pay less, at least initially, than a K–12 teaching job. If, however, you are a mid- or early-career professional considering university teaching, there are a few things you need to know. This chapter is about my own journey leaving my job as a public-school teacher to become first a consultant and presenter and now a university professor, a role that integrates all three skill sets. In many ways in this one job, I found my true self. I will provide some facts and share my experience to help you decide if such a job is a good fit for you. I will also share market trends and opportunities for the aspiring higher education professional and explore the comparative differences of working in higher education versus K–12 education. I will also introduce a competency model that is adaptable for all discussed roles.

My Story

As a public high school instrumental teacher, I knew my perspective was a little different from that of other teachers. I was acculturated from the beginning of my university training to view the world through the eyes of competitive musical performance, where award and acclamation served as fuel for self- and organizational improvement. Employed in two small towns and districts, I loved my job in each location, but I served my profession first.

By my mid-thirties I had two children and a wife, had earned a master's degree in music education, and was winning awards and accolades in my field. Beyond wanting to expand my influence from the music program to a whole school, I frankly needed to earn more money. Back to school I went. Within a semester of attaining my principal licensure, I was appointed to an assistant principal job at a middle school. With encouragement of Bob Gordon, then superintendent of Asheboro City Schools in North Carolina, I joined Toastmasters International. If ever you wish to cure yourself of using filler language, hasten to join your local Toastmasters chapter. One becomes an eloquent speech master or loses one's mind in the trying.

Bob also gave me my start on what would ultimately become the road toward my current professorship by selecting me to participate in the local chamber of commerce leadership institute. I became a master at presentations and got connected to numerous local civic leaders.

Through other local and regional education initiatives and projects, I met some of the most well-established, highly esteemed people in my field. Within three years of my new career in school leadership, I had enrolled in a doctoral program and, using my professional connections, was offered a part-time position as field representative for SERVE, a newly established R&D laboratory center located on the campus of the University of North Carolina at Greensboro. This was my introduction to teaching in higher education.

Having completed my doctoral coursework, I returned to my home school district to work an additional year as assistant principal, and then was appointed principal at the school where 30 years earlier I had been a student. The words of T. S. Eliot seemed then and now to capture my life: "We shall not cease from exploration and the end of all our exploring will be to arrive at the place for the first time." Evincing the truth of Eliot's words, here is what happened:

On the first day of my new job as principal, I had a visitor. Looking up from my desk, I saw standing before me my first-grade teacher, Miss Rempson. Her then classroom shared a wall with my now office. I recognized her immediately and hurt my face smiling, eyes almost filling with tears. Hugs and catching up on the last 30 years of our lives ensued for the next 20 minutes. Miss Rempson, at the time of her visit in her late 80s, then grew unexpectedly quiet. "I always knew you were destined for great things," she said, her words predating the journey from there to now.

Twyla Tharp (2006), in *The Creative Habit: Learn It and Use It for Life,* explores how her own childhood experiences became a wellspring for life as a professional dancer and choreographer. Tharpe encourages her readers by writing about her own first creative act:

> "When I was eight, living in San Bernardino, California, I was always forced to practice alone in my room. But I wanted human contact and some commentary on what I was doing. So I would gather the kids in the neighborhood and convince them to come with me to the back canyons where we lived, and there I would design theatrical initiations for the kids. This was my first creative act, my first moment of being a floor general and moving people around. My first choreography."

Like Tharp, I encourage readers of this chapter to reconnect with and use as a springboard for career change those times when, as a child, you found yourself so immersed in a thing, a thing that seemed so natural as to be indistinguishable from your very identity, the thing in which you were most you when you were engaged in it. Such people become leaders in their field. Adults yearn for authenticity. For me, being authentic meant making solitary thought and action public. To consult, present, and profess was, and is, me being my true self.

After four years as principal, I returned for a second stint at SERVE, which proved to be among the most formative times of my career. As SERVE's footprint included the entire southeastern United States, our projects routinely targeted schools and communities most at risk of failing their students. Consequently, my work took me to the Delta Region, that broad stretch of land between Memphis, Tennessee, and Jackson, Mississippi, where deposited by

100,000 years of overflowing river, the soil was as rich and brown as chocolate fudge. Lessons and stories from SERVE continue to inform my practice as a consultant, presenter, and university professor, and I am better at all three for the experience.

One experience, in particular, stands out—my appointment as project director and co-principal investigator for the SERVE Leaders Institute. I had been with the organization for less than a year when I was given the opportunity to staff, design curricula, implement instruction, and manage operations for a multimillion-dollar, two-year, federally funded demonstration project to develop leaders for charter school and innovative public-school leaders. The project was a huge success, resulting not only in improved school performance but in having grown in me a professional with fire-tested conceptual, human, and technical competencies that serve me still.

Somewhere near what would be the end of my work as director of the SERVE Program on Education Leadership, I got a call from Joe Peel, a retired superintendent looking for help in expanding a district leadership into a regional consortium of districts. The result was the Triangle Leadership Academy, one of the most influential school leadership academies in the southeastern states. The next six years of my career found me working first as director, and then as executive director. We provided programs for leaders at every level, from C-suite to classroom, state house to schoolhouse. Our mission statement evinced our commitment: Changing leadership from the power and position of the few to the collaborative practice of the many. And we did.

Following the Great Recession and waning financial support for the academy, especially from our public-school member districts, I retired from the state of North Carolina and launched my own consulting company. Missing life in the arena, within a year I had accepted a full-time teaching position at Gardner-Webb University. It seemed that my entire professional and personal life had led up to this moment, and it was not as though I had no point of reference. I had been adjunct professor in no fewer than four universities, including North Carolina's largest, North Carolina State University. I was contributing competently to four graduate (one master's, and three doctoral) programs, including the doctor of education in organizational leadership. I also remained a mainstay in the master of executive leadership program for aspiring principals. What brought me greatest joy

was connecting on a personal level with my adult students, all professionals seeking to improve their lives and the lives of those around them. After years of developing programs and products, I was at last putting my energy where it mattered most—developing people.

Six years at Gardner-Webb University came to an end when I accepted an unexpected offer to work in leadership studies at the Stout School of Education at High Point University (a small private liberal arts institution whose mission highlights the institution's caring teachers). It was an extraordinary education, and an inspiring environment—a transcendent purpose worth waking up for every day. As I approach the end of my second year at High Point University and the last decade of employment anywhere, I could not imagine a happier, more authentic work life for myself.

What Is University Teaching?

At this point, assisting you in better understanding what teaching in higher education is and is not like, I want to pull back the curtain a bit. I would also remind you of my atypical pathway and late arrival at its doors. Believing then that proximate experience matters, I talked with several of my younger High Point University colleagues, all more recent K–12 immigrants than me. In aggregate, here's what they told me:

Junior professors in undergraduate programs—that is, untenured assistant professors and the rank at which almost everyone starts their higher education career—are assigned teaching loads that rival the worst K–12 settings. For example, one of my colleagues teaches six different courses with six different class preparations, six different sets of essays and tests to grade, and six sets of personalities whose learning needs range from "I've got this" to "Is this going to be on the test?" In terms of teaching load, things get worse before they get better.

On another issue, several undergraduate-program colleagues commented on intrusive parental concerns. Falsely assuming they left their helicopter parents back at good old PS 99, teachers of undergraduates find a surprising number of moms and dads insinuating themselves into the academic lives of their adult children. Colleagues in large public universities have said the same thing. Do not leave K–12 education for the university if parents there are driving you crazy. They will follow you.

Another emerging issue among my younger peers is the abiding sense of responsibility they feel when realizing that they are no longer teaching children; rather, they are institutionally and ethically charged with grooming young professionals who themselves may teach children. Being a force multiplier is not for the weak-hearted.

Beyond obligations associated with teaching itself, my colleagues remind me that there are tasks concerned with the care and feeding of the institution. Most universities are run by faculty committees. With no sense of irony at all, there is even a committee on committees. Larger universities have a senate whose job, in part, involves advancing the concerns of faculty. And faculty concerns are many—from tenure and promotion to professional development to student conduct. After one's first year, everyone is expected to serve on one or more committees.

To be a teacher of teachers conveys more responsibility still. Tasks singularly associated with school or college of education faculty include, for example, conforming with state regulations governing licensure, internship experiences, and education program and candidate credentialing and certification. In my experience, universities often hire professionals who focus primarily on such issues. Public education is a function of the separate states and institutions that prepare the states' teachers must, for better or worse, march to the drum of state lawmakers. In many ways, the press for conformity will resonate very well with K–12 teachers moving to higher education, particularly those who teach teachers and school and district leaders.

Rank and Advancement in Higher Education

How does one move up in higher education, and what are its ranks? As stated, one usually begins as an untenured assistant professor. In my undergraduate education, the assistant professors taught all the 8 a.m. classes. If the institution is a Research 1 university, the old saw "Publish or perish" applies. You may expect not only the teaching load to be great, but also expectations for publication in double-blind, peer-reviewed journals approved by the academic program in which you teach. A minimum of two published articles per year is typical. If you are successful in obtaining tenure in the normal five- to six-year timespan, you may also apply for the rank of associate professor. With higher rank comes higher pay. If you fail to obtain tenure in the contracted

period—which is up to a committee of your peers—you may only have a year left at that university. Move up or move out. Some people are content to remain at the associate professor rank while others, like me, are unhappy until they climb the next mountain, and become a full professor.

Two other roles that bear mentioning are adjunct and visiting professor. The former works part-time with the university and is increasingly a point of entry for newly minted PhD and EdD program graduates pursuing university teaching. (In a subsequent section, I will share statistics that support my assertion.) The visiting professor job is typically full-time but time-limited, often on-loan to one institution by another institution. Such a teacher often serves to prime the pump for a new program or to revitalize a moribund program.

Transferable Skills

If you're looking for a set of professional competencies equally adaptable for presenters, consultants, and teachers in higher education, I recommend exploring the North Carolina Standards for School Executives (North Carolina Board of Education 2013), whose adoption was informed by Triangle Leadership Academy (Table 7-1). My professional development colleagues and I have field-tested these 21 competencies on nearly 2,000 professionals and find them uniformly robust in capturing the responsibilities of people who consult, present, and teach adults daily—the school principal. In my experience, the cited competencies are generally possessed by successful K–12 teachers as well.

Table 7-1. 21 Competencies for Consulting, Presenting, and University Teaching

Competency	Description
Communication	Effectively listens to others; clearly and effectively presents and understands information orally and in writing; acquires, organizes, analyzes, interprets, and maintains information needed to achieve organizational objectives.
Change Management	Effectively engages staff and community in the change process in a manner that ensures their support of the change and its successful implementation.
Conflict Management	Anticipates or seeks to resolve confrontations, disagreements, or complaints in a constructive manner.
Creative Thinking	Engages in and fosters an environment for others to engage in innovative thinking.

Table 7-1. 21 Competencies for Consulting, Presenting, and University Teaching (cont)

Competency	Description
Customer Focus	Understands the stakeholders as customers of the work of the organization; comprehends the servant nature of leadership and acts accordingly.
Delegation	Effectively assigns work tasks to others in ways that provide learning experiences for them and in ways that ensure the efficient operation of the organization.
Dialogue and Inquiry	Skilled in creating a risk-free environment for engaging people in conversations that explore issues, challenges, or bad relationships for the purpose of obtaining system goals.
Emotional Intelligence	Able to manage oneself through self-awareness and self-management and able to manage relationships through empathy and social awareness. This competency is critical to building strong, transparent, trusting relationships throughout the organization's communities.
Environmental Awareness	Becomes aware and remains informed of external and internal trends, interests, and issues with potential impacts on organizational policies, practices, procedures, and positions.
Global Perspective	Understands the competitive nature of the new global economy and is clear about the knowledge and skills clients need to be successful in this economy.
Judgment	Effectively reaches logical conclusions and makes high-quality decisions based on available information. Gives priority and caution to significant issues. Analyzes and interprets complex information.
Organizational Ability	Effectively plans and schedules one's own work and that of others so resources are used appropriately, such as scheduling the flow of activities and establishing procedures to monitor projects.
Personal Ethics and Values	Consistently exhibits high standards in the areas of honesty, integrity, fairness, stewardship, trust, respect, and confidentiality.
Responsiveness	Does not let issues, inquiries, or requirements for information go unattended. Creates a clearly delineated structure for responding to requests or situations in an expedient manner.
Results Orientation	Effectively assumes responsibility. Recognizes when a decision is required. Takes prompt action as issues emerge. Resolves short-term issues while balancing them against long-term goals.
Sensitivity	Effectively perceives the needs and concerns of others. Deals tactfully with others in emotionally stressful situations or conflict. Knows what information to communicate and to whom. Relates to people of varying ethnic, cultural, and religious backgrounds.

Competency	Description
Systems Thinking	Understands the interrelationships and effects of organizational influences, systems, and external stakeholders, and applies that understanding to advancing the achievement of the organization.
Technology	Effectively uses the latest technologies to continuously improve the effectiveness and efficiency of the organization.
Time Management	Effectively uses available time to complete work tasks and activities that lead to the achievement of desired work or goals. Runs effective meetings.
Visionary	Encourages "imagineering" by creating an environment and structure to capture stakeholder dreams of what the organization could become for all the workers.

What to Consider

As you consider whether or not university teaching is right for you, be aware of several important differences between it and K–12 teaching, then ask yourself some questions. First, the autonomy one experiences in higher education is lightyears beyond what teachers in K–12 enjoy. With minor variation, university teachers are expected to create their own syllabi, choose their own teaching resources, and design their own assessments. Depending on the level and program, classes are typically one to five hours in length and may be taught as seated (one real space, same time), virtual (all online), or blended (a combination of seated and virtual). University policy typically stipulates faculty office hours, ranging from 10 per week to five per day. That is policy. Then there is practice. Practice is what one informally negotiates with one's dean (like a school principal) and colleagues. Ask yourself, *am I self-directed?*

The autonomy of higher education builds from the fact instructors teach adults, as opposed to teachers in K–12, who are responsible for children and adolescents and serve legally in loco parentis, that is, in place of the parent. The other reason for autonomy in higher education is that teachers in most universities are considered knowledge creators, not knowledge conveyers. As mentioned earlier, that means scholarship and original research, resulting in publication, is the norm. Obviously, scholarship requires time and resources. Really creative university teachers apply for and receive grants and contracts that provide for "buying out" or using others' funds to pay them for the time they will spend in research and for the "substitute teacher" who must be hired

to cover the classes they would otherwise teach. I once served with several professionals who didn't teach a single class in the near 10-year association I had with that university. Ask yourself, *am I creative?*

Another difference between university and K–12 teaching is what industry calls "platform hours," the amount of time the teacher spends in front of students in seated or virtual classes. As I've suggested, here is where some major differences begin to appear, depending on whether one teaches at the baccalaureate, master's, or doctoral level. Teaching undergraduates typically requires more time (up to three classes per week) than teaching those who aspire to a doctoral degree. My university work has been restricted to teaching in master's and doctoral programs. If I am not meeting my students in a seated class on Saturday or Sunday, they have generally worked a full day before I see them. In either case, there are issues both with motivation ("I'd rather be home") and ability ("I am worn out"). The upside is that seated classes at the doctoral level occur much less frequently—as few as once per month. Of course, during intervening weeks, there is the expectation for virtual work, sometimes synchronous (logging in to a shared platform with video and audio capability), sometimes asynchronous (working on one's own on a common task). Ask yourself, *am I flexible?*

A fourth point of difference between university and K–12 teaching, though diminishing, is accountability and standardization. Whereas K–12 teachers have long lived under the federal governance of the No Child Left Behind Act of 2001 and the more recent Every Child Succeeds Act of 2016, university teaching has been affected to a lesser extent. The concept of academic freedom, so valued by tenured faculty, has been under increasing pressure. Ask yourself: Am I accountable?

If none of what I have written so far has dissuaded you from casting your net into the deeper waters of higher education, I leave you with five more things to think about:

First, to teach at most universities and in nearly any subject, you must have a doctoral degree. My transition from school principal to university professor would not have happened without my doctoral degree. Is the degree for everyone? Absolutely not. Think ahead, understanding that, in the time you could have earned a doctorate, you unquestionably will be older, but will you also be considered an expert in your field? Think

carefully about your program of study. That said, most doctoral degrees carry the same institutional weight.

Second, when you get your first university teaching job, work with your colleagues. Be collegial. Avoid the "Peacock Farm," solo artistry and self-aggrandizement. It is true that tenure and promotion committees reward individual effort (wrongly in my mind), but collaborate with your colleagues as often as you can and in every way you can. Think both inside and outside the box. Be flexible.

Third, even though they are harder and harder to obtain, seek a tenure track position if you can. With tenure comes increased independence and professional status. Sometimes intellectual freedom gets a bad rap, but scholarship is best practiced in an environment free of political pressure and independent of employment consequences. That is what tenure earns you.

Fourth, be strategic in determining what to say "yes" to and when to say "no." Time is your greatest resource. Be an intellectual packrat. As the proverb says, "All is grist for the mill"; that is, what you read or write and discard for one purpose may be useful for another. Waste nothing. Be disruptive; follow the rules, then break them. Every innovator has upset someone or something somewhere.

Finally, and most importantly, put your students first. Treat them as your clients and the professional adults they are. To the best that you can and as you would with your clients, let your students be co-developers of your curriculum, instruction, and especially assessment. Provide voice and choice as often as you can. Pay attention to their personal lives. Have a family-first policy, and for that matter, make it yours too. Cut them some slack. Let them see you as a person worthy of emulation. That means being authentic.

Market Conditions for Teaching in Higher Education

Each August, the *Chronicle of Higher Education* releases its annual almanac. In the "Almanac of Higher Education 2019-20," the first thing the reader sees is that, like K–12 education, universities and institutes of higher education (IHE) come in public or state-supported, and private or tuition-driven forms. In the academic year 2017–2018, a total of 837,577 instructional staff (teachers) were employed in one or another U.S. IHE, combining baccalaureate, master's, and doctoral institutes. In the same year, the number

of teachers in K–12 was nearly 3.7 million. In other words, K–12 education employs four to five times more teachers (National Center for Educational Statistics 2018). Bottom line: The market for university teachers is much smaller than that for K–12.

Not only is the chance of full-time employment with an IHE reduced because of numbers of jobs compared with K–12 education—which is compulsory for all children up to age 16 in most states—it is reduced because of university instructor employment trends. A bar graph in the Chronicle's almanac labeled "Change in Percentages of Full-Time Faculty Members Who Were Non-Tenure Track, by Institutional Classification, 2008–9 and 2018–19" caught my eye. Over the 10-year period in question, the percentage of non-tenured (read: temporary or unstable) teaching positions in higher education, combining baccalaureate, master's, and doctoral institutes, increased nearly 15 percentage points for public institutions and 17 percentage points for private institutions. Bottom line: The data support what I have been seeing first-hand for the last seven years—an increasing number of newly minted doctoral graduates attaining temporary work as adjunct professors, sometimes at more than one university. Why? The chase for a piece of the dwindling higher education pie is making for a bit of belt-tightening in the Ivory Tower.

Breakpoint: The Changing Marketplace for Higher Education (2015), by Jon McGee, explains the plight of the contemporary university, which is affected by demographic, economic, and cultural disruptions, resulting in what McGee calls "a liminal moment." Addressing what universities must do to recapture "the good old days," the period from 1993 to 2008, according to McGee, goes beyond the purpose of this chapter. But suffice it to say, the challenge of attracting students to four-year institutes and keeping them there is what is keeping every university president in America up at night. The downstream impact for employment in this time of disruption is dire, and I have said nothing about the impact massive online open courses on jobs. I wish I had better news, but higher education is experiencing a crisis, a point at which change is made or the lights go dark. If you are an early or mid-career professional, think long and hard about your tolerance for risk. Have plans B and C ready.

What Would I Have Done Differently?

As my narrative suggests, my transition from K–12 to university teaching was not accomplished in one fell swoop. Leaving public school for university teaching occurred in fits and starts, each role supported by and interwoven with other roles over four decades of work. In hindsight, however, I can identify three life lessons, probably universal ones, that may have accelerated my integration.

First, I should have been more responsive to my heart. Having spent my childhood in a dysfunctional, emotionally volatile family, I believed that to be guided by one's emotions was to be misled. I distrusted my feelings both for a life partner and career, chose what I then thought were more rational paths, and hid in the relative security of a job in public education. Life Lesson 1: Embrace your passion.

Second, I should have appreciated the need to depend on other people more than I did. For example, I should have stopped pretending to know what I did not know earlier, and instead sought the wisdom of people who actually did things better and knew more things than me. I should have subordinated myself, sought the counsel of my superiors, and expanded my professional network faster and with brighter people than I did. Life Lesson 2: Don't be a smart ass.

Finally, I should have been less selfish. As I learned new things and gained new skills, I should have taken under my wing people I could have helped. I would have appreciated that ambition is good but only if in the service of right things, and that the goal is not to be the best in the world, but the best for the world. And I would have valued people as people, not as steps to my brighter future. Life Lesson 3: Relationships are all there is.

Summary

Amazing as it may seem, life is not altogether about you. What need do you see in others? Answering that question may be the most consequential thing you can do for yourself as an emerging university teacher. Additionally, if you are faced with an opportunity to work with an organization that serves public education, not strictly teaching at a university, such as was my case with SERVE and later with Triangle Leadership Academy, my advice is to take

it. Doing so will only increase your capacity to help others. Finally, as Twyla Tharpe reminded us, remember what made you happy as a child and do that now. Your true self is waiting!

Chapter 8

A Step Up: Management and Leadership

Jenifer Calcamuggi

Twenty years ago, there were only two things I aspired to achieve in this world. The first was to become a teacher and the second was to become a great mom. In 1997, at the age of 22, I began my teaching career with 23 first graders in an underprivileged Fort Lauderdale school. To claim it was a challenging way to start my first year of teaching is an understatement. Most of my students lived fatherless in dilapidated apartments within walking distance to the school. They arrived early for breakfast and left late for snacks all provided by our school; this was the easy part. My students did not live in homes with structure or positivity. Many lacked social skills and were performing poorly academically. I once had a child bite, scratch, and lose their facilities in front of me. This first teaching job tested my courage, creativity, resilience, ability to learn on the fly, and tenacity. It also challenged me to become more empathetic and compassionate. From this foundational experience, I was able to begin to craft my professional belief system and continue to learn and expand my educational career across different schools and among various grade levels.

After several years of teaching, I welcomed the first of my three daughters into the world and transitioned to being a stay-at-home mom. Now, I was the

parent attending open houses and PTO meetings. I relished the paradox of this new experience, that I was able to take the skills I learned in my years of teaching and help in a different way. I had profound respect for my daughters' teachers. I knew the hours they spent grading papers on a Friday night, I understood the length and depth of time and organization it took to plan a holiday party, and I appreciated the additional dollars they chose to spend on their students even though they had no obligation or in some cases no means to do so.

Throughout the next 10 years of raising my daughters, I was able to identify the teachers who stood out—the teacher leaders. These were great teachers who were dedicated to having a true effect. For them, it was not about the paycheck but their desire to be impactful. It came from the same deep, intrinsic self-fulfillment that I'd had when I taught. These are the teacher leaders we aspire to be, and the special ones we never forget.

In 2008, I took this same desire for helping and parlayed it into creating a design curriculum for children. While sewing in my basement one day, I noticed that my little girls were playing with the fabric, ribbon, and trim just as I did when I was small. What started out as me being a mom trying to help my daughters learn these pastime skills quickly grew into courses at school districts and design studios. It was the same educational degree and teaching background coupled with my passion for design that allowed me to develop a program for helping children learn these bygone skills. This entrepreneurial endeavor taught me business savvy and financial acumen, and introduced me to marketing and the power of social media and technology. This season of my life provided my first taste of the business world, and I was intrigued.

During the next few years, I went on to become a working single mother of three pursuing a master's degree in educational leadership and curriculum development. The road was unexpected and not easy. There were countless hours of studying and juggling a few jobs at the same time. I remember when my water was turned off from nonpayment and I had to swallow my pride and enroll my girls in free and reduced lunch even though I was teaching at their school. At the time, I knew I wanted and needed to do something different but I had no idea where to start or what my options were. All I knew was that I loved teaching, I believed it was my calling, and I wanted to make a difference in the lives of others. I explored my career options with a couple

of my college guidance counselors, and those conversations, combined with extensive research, led me to uncovering a whole new world called corporate education or learning and development. So, instead of accepting an expected leadership role at my daughter's school or continuing down the traditional educational path, I shocked everyone and took on a national corporate trainer job and and became the director of learning at the largest office supply companies in the country, a position I continue to be humbled and grateful for. My career path has been unique, and I wouldn't have it any other way. All the lessons I have learned and the failures I have had on my journey so far have contributed to a growth mindset. This same mindset, coupled with hard work and grit, has enabled me to succeed.

Whether you are in the corporate world or the classroom, we are all trying to solve problems and make a difference. The environment, audience, and tools may be different, but the objectives are always the same. As a director of learning today, I continue to try and serve my internal customer with this mindset. I have experienced that when we embrace lifelong learning with a growth mindset, we can venture into any career.

What Is a Director of Learning and Development and What Do They Do?

A leadership role in talent development encompasses a variety of interpersonal and professional skills. You will be challenged daily and will have to be able to manage diverse people as well as many conflicting priorities and projects at the same time.

The effective leader first begins with learning and understanding their team. Who are the people on your team and how will you all work together with trust, transparency, and open communication to succeed toward a common goal? You also need to understand your business and the key overall business strategy. What are your organization's goals from a people and business perspective? What are the gaps and opportunities? What are the strengths of your organization? It is paramount to understand these components so that you as a learning leader can position your team to align and help.

From that awareness and assessment point, you, along with established partnerships with the business, are responsible for designing and developing a talent strategy that will promote, support, and enable learning across your

entire organization. Depending on the size of your enterprise, you may also be the leader of a team of trainers, content creators, curators, instructional designers, technology specialists, and other managers. As a team, you're always working together to meet the needs of the people and business at hand. It is a large managerial effort, requiring excellent emotional intelligence, organizational skills, and effective, quick decision making. Think architect, entrepreneur, designer, teacher, strategist, financial planner, business leader, coach, and visionary blended into one role.

As you have read in the previous chapters, the roles within the L&D and training field can be very different yet overlapping. From a trainer to an instructional designer or a coach to a consultant, there can be a lot of common ground in skills and deliverables but many day-to-day differences. While a trainer may be in front of a classroom teaching and facilitating a new program or system for employees, the instructional designer may be the one who marries technology and content into a seamless learner experience. The coach is there to help employees thrive in their careers and life choices, while the consultant is there to strategize with leaders and suggest new processes or procedures for the workforce or business case. To become a manager or leader in any of these areas takes time, perseverance, a focus on the business objectives, and, above all, a commitment to your team.

The fantastic part about this role and industry is that each day provides a unique set of challenges and opportunities to grow. For those who need them, there is the potential for creating routines in your schedule, but for me, every day is a little different. Most of my days are filled with meetings of some kind:

- building team culture
- coaching and collaborating with my direct reports
- removing barriers and roadblocks my team bring to my attention
- gaining alignment among stakeholders
- face-to-face or virtual meetings with team members business leaders (leaders from business segments, EVPs, or even the CEO)
- strategy sessions
- virtual and live presentations
- designing frameworks
- contract negotiation.

Along with these meetings, I also must manage and influence others, be responsive to a steady stream of emails and phone calls, engage vendors, and make a million definitive decisions all while keeping my team and our company top of mind.

Putting People First

As a leader, I cannot say enough that the biggest part of the job is the commitment to your team and your people. Make time to not just meet and listen with them, but really get to know your team. Ask them for feedback and input as you are planning a new strategy. Spend time coaching and mentoring them as much as you can. Just as in teaching, find those teachable moments wherever you are and teach away! It is so important to make the time to not just meet and listen with them, but really understand who they are and their perspectives. Understand them. Commit to consistently learn about them. Ask them not only for their input but for their feedback as you are planning a new strategy. Some of the best ideas that took off come from our teams! As a leader, you have to know that you don't have *all* the answers and you have to be open to listen and grow with and by your team.

You also need to understand your audience. Whether you are interacting with students, parents, a principal, or a CEO—know your audience! The jokes you may tell your third-grade class are not what you would share with your peers. The way you explain items to a peer is not how you would explain or share with a CEO. When dealing with direct reports or superiors, I have found these five rules serve in all areas:

- Be authentic, transparent, and honest.
- Actively listen and seek to understand their needs: Your customer is first—parent, student, CEO, or internal stakeholder.
- Clearly and succinctly communicate. State your intentions so that they know you are coming from a positive place.
- Always demonstrate empathy.
- Thank them for their time and the work that they do.

My first student—well before I officially became a teacher—was my younger sister Gina. She had a speech impediment that prevented her from properly pronouncing many words, including my name. I spent long hours waiting for Gina to come out of her speech therapy classes at the Easter

Seals. She would always come out of the office with a white carbon-copy paper and show me her homework; my hands would get stained from the blue ink. (It was 1981, well before email and the copy and print technology of today.) At least three times a week, I would practice with her and help her with her homework. At seven, I became a teacher and began to embrace the notion of lifelong learning. Two weeks before Gina died in a tragic car accident, she was able to fully pronounce my name. And although I was only able to hear her say my name correctly a few times, I still carry with me the pride, joy, and fulfillment of those times together.

This ideology of lifelong learning, coupled with the desire to make a difference in the lives of others, are what I have continued to impart in my classroom and corporate career experiences. To me, the very core of teaching always translated into helping. And when we think about it, the best measurement of helping is whether you made a positive difference. As teachers, we may refer to passing a test or the promotion of a student from one grade to another. As corporate learning professionals, this may mean a successful product training launch or development that resulted in increased revenue or return on investment (ROI). As a leader and manager, this may mean helping coach someone on my team to become a star at the company or in a new organization. Whatever the environment and however old the learner is, effective teaching and training are all about making a successful learning impact.

Continue to Enable Learning With Models

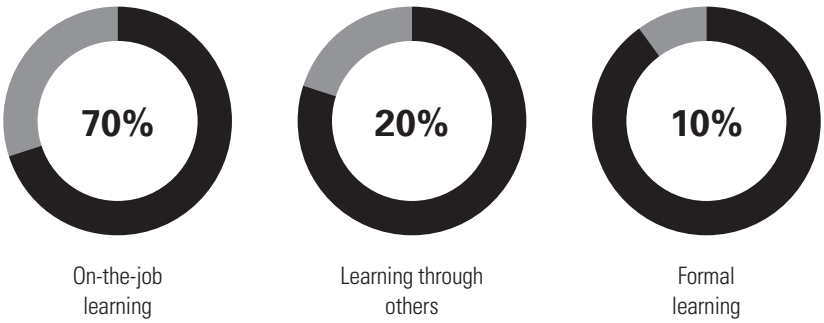
In the learning and development world, there is no shortage of models and methods on which to base your practice and project. We teachers also love to have models to follow and impart to our learners. In the previous chapters you learned about ADDIE, SAM, and LLAMA, and I have two more to add here in depth.

The 70-20-10 Framework

The 70-20-10 framework works especially well for leaders in learning and development. It expresses a split in the way people learn and encourages learning in the flow of work (Figure 8-1). The 70-20-10 framework is easy to apply to both corporate environment as well as the classroom. For years, the

educational industry has been trying to shift teaching styles to take on more of a pedagogy stance incorporating experiential learning tactics, rather than the sage on the stage approach. This framework enables that by encouraging learning on the job. Essentially, by adopting it, we are enabling learning to happen at any time and any place, supporting the lifelong learning mindset. This can be especially true for leadership development, in which leadership skills aren't taught from a book as much as they're conveyed by mentoring, coaching, the direct experiences and challenges that develop great leaders.

Figure 8-1. The 70-20-10 Framework Adapted for Leadership Development

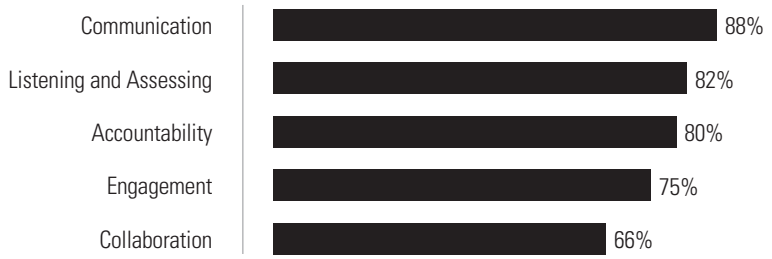


ATD's ACCEL Model

Another model that we cannot overlook when discussing management is ATD's ACCEL model. ATD developed the ACCEL model in 2016, and it has quickly taken off as an industry standard for managers. This model is for people managers, also called front-line managers, who have direct reports. The model focuses on accountability, collaboration, communication, engagement, and listening and assessing. To be a highly effective manager, you must possess and continuously develop all five of these skills (Figure 9-2). When you move from being someone who is responsible for performing a task to being a strategic thinker and people manager, you shift from managing hands to managing minds, and that requires a new skill set. Each of these ACCEL skills also fits the description of a great teacher. You not only impart and teach these skills to your students, but you also apply them to your own work every day.

Figure 8-2. ACCEL Skills in Demand

In early 2016, ATD Research surveyed 847 talent development professionals about the ACCEL skills of managers. Responses showed the value of all five ACCEL skills.



Percent of respondents indicating high or very high extent.

Source: ATD (2016).

Accountability: When you hear accountability, you might think blame, or taking ownership for your or your team's mistakes—this is reactive accountability. Proactive accountability starts well before that. Leaders who take a proactive accountability approach with their team and tasks bring foresight and motivation rather than fear and control to their organizations and their teams. Knowing what you are responsible for and making sure your team is all on the same page brings with it the ownership and personal commitment well before the tasks or projects start.

Collaboration: This means working with your team and across your organization to achieve a common goal or mission. There are three key areas within collaboration: sharing a vision, focusing on strengths, and clearing obstacles.

Communication: Good communication is the cornerstone of any relationship—professional or personal. Thoughtful communication for a leader includes the who, what, when, how, and why. Know your audience, what you are trying to say, and frame that messaging appropriately. Have a full picture before you communicate with someone on your team or above you. Have good timing and knowledge of your purpose with your message—what do you hope to get out of saying this? Your email presence is important, too, because the workplace comprises so many diverse, dispersed teams.

Engagement: Having emotionally connected team members who are invested in the outcomes of your team, department, and organization are

what every leader dreams of. You can create this kind of engagement for yourself and your team by having a clear vision, feeling like the work you do matters, promoting and engaging with your team and others in the organization, and gaining and giving recognition.

Listening and Assessing: A great leader listens—really listens, not just waits to talk next. Many of us wait to reply when someone talks, but active listening is key for being a person who truly connects with others. You can become an active listener by paying attention to more than just the words—observe the emotions and details the speaker is expressing, and focus your attention on them. Do not interrupt or jump to conclusions.

Other models and techniques you might consider researching are Kanban, the start and stop model, six thinking hats, the Eisenhower box, and the Johari window.

Knowledge and Transferable Skills

Much like the skills in the ACCEL model, managers and business leaders require a certain set of skills to lead their teams and learning functions. Teaching is a form of entrepreneurship; you are always managing your own business or classroom. As a teacher, there are three skill areas you already embody that you will carry into the corporate world:

- **Planning vision and strategy:** To be an effective leader you must be able to able to plan and scope work out properly as well as delegate. As a teacher, you create the learning strategy and remediations for your class and underperformers. You use data, anecdotal records, and observations to drive your decisions and planning. Similarly, as a learning leader, you will be responsible for a larger strategy with a larger audience. This strategy should also be data driven and include road maps with milestones and measures of success, as well as learning needs analysis or assessments.
- **Building effective teams and coaching:** As a teacher, you build a culture of learning in your classroom as well as a sense of pride and intrinsic motivation. Students need to feel happy and safe coming

to school every day. Many teachers conduct one-on-one coaching sessions with their students as well as peer coaching. The same is true for learning leaders. You are responsible for the culture within your team as well as driving or transforming the learning culture in your organization. You may choose to invest in coaching programs, and through these programs instill a sense of fulfillment and purpose by aligning work with what your team members would like to do. You use one-on-one sessions to connect, coach, and course correct—all of which are paramount for success.

- **Effective communication:** You cannot teach without being able to take large, difficult concepts and translate them into bite-sized chunks for your students to understand. You also must be able to communicate to parents, principals, and your peers. Your ability to resolve conflict with communication comes in handy with inquisitive or unhappy parents and in classroom disputes. This means orally and virtually—you must be able to articulate and communicate in both areas. The same is true for training and leading. You must be able to successfully articulate your strategy with stakeholders, executives, and teams to influence them and gather alignment during presentations and meetings, daily work, and in conflict with teams and associates. Your email presence is important, too, because the workplace is composed of so many diverse, dispersed teams.

Growth and Market

Training managers show a job growth rate of more than twice the average national growth rate, according to the Bureau of Labor Statistics. While the national average job growth rate is at just 4 percent, for training managers the job growth rate is 10 percent. That is a pretty significant number when you also compare it to the growth rate of the average elementary school teacher, at just 3 percent (below the average), or even high school teachers at 4 percent. According to ATD's 2019 salary report, the median training manager's annual salary was $111,340; compare that to the average teacher salary in the U.S., which was around $58,000.

Of course, for many, starting off in a new field means you will have to get your foot in the door before becoming a manager; but not for everyone!

Usually teachers have to start off learning the business side of corporate education. Topics like business acumen, managing a budget, dealing with executives, financial planning, and corporate communications styles might seem a bit foreign at first to people who have never worked outside the school system. For some teachers or principals looking to make the switch from academia to corporate education, becoming a lower- or mid-level manager might be obtainable.

Read on to find out what you need to get started.

Future Trends

As repetitive and administrative tasks become more automated, managers will have more time to focus on their employee development. Being able to offer more time for employee development means spending more time one-on-one with their employees but also learning how to use the artificial intelligence (AI) technologies that are helping free up that time.

Check out this article to learn more: linkedin.com/pulse/top-10-workplace-trends-2020-dan-schawbel.

What You Need to Go Forward

If you are interested in a role in learning and development, the first thing you should do is research. Look at different roles in the field to become familiar with what may interest you. The second thing you need to do is raise your hand at work. Let your administrators know you are interested in taking on more leadership responsibility and making a wider impact than just being in your classroom. This will enable you to grow and enhance your skills by becoming a teacher leader, possibly a curriculum specialist. You could also obtain a role in your school district. Become certified as an intern teacher; take on interns. Attend workshops and conferences. Choose an area you're passionate about and become an influencer. Become a leader in your field. Raise your hand first in your own school; teach other teachers; train at workshops both internally and externally. Start a blog; write and publish articles. Be an entrepreneur, create your own materials, and sell them. Take leadership or business courses. Focus on learning about yourself and expanding your talents, and this will be the stepping stone to building your brand.

If you are already in the training field, communicate your ambitions to your leader, ask to take on more responsibilities, solve problems that you see, and take the initiative; carve out your reputation as a high-performing individual. This encompasses aspiration, ability, and engagement. Demonstrate this to your team and your leadership. Ensure you are working on projects that continue to increase in size and scope as well as visibility to different leaders and teams.

Another way to grow your engagement is to learn as much as you can. Commit to teaching yourself. That's the only way a new position will work for you. Join associations such as ATD and the Training Industry. Begin by googling and being inquisitive. Connect with professionals on LinkedIn; send them a message asking if they would be willing to speak to you about how to break in. If you get an instructional design certification, think about becoming a contractor and take on additional work to get your feet wet. A lot of organizations contract their design work. In addition, one of the most effective ways to develop yourself professionally and develop your networks is to find a mentor through one of your connections.

Speaking of networks, form one around yourself. Choose an area you're passionate about and start laying the groundwork to be thought of as an influencer or thought leader in that area. There are a number of ways to do this and a number of books and content sources out there to help you establish your personal brand (See the references and additional resources section for ideas.)

As a teacher, you know the importance of education. Show your dedication to lifelong learning by taking leadership or business courses or getting a master's degree in human resources, organizational design, or curriculum design. While you may not need a master's degree for more junior roles, it will be preferred for a manager-level position. A master's degree in education is often seen in this field, but you may also consider a certificate program in instructional design or organization development to show your intent to transition into the corporate world if you don't have enough experience. Many colleges offer summer courses or online courses you can take at your own pace to complete this work. Sometimes getting a summer internship at a business can also create a great pathway for entering the field as well as give you a nudge in your corporate experience.

All of this involves taking a risk and having courage. At the end of the day, you're not going to have all the skills and you won't be perfect at everything, but what will set you apart is drive, resiliency, and determination coupled with hard work and a lifelong learning mentality. You must want to grow and develop. You must want to continue to make an impact.

What to Consider

There are many pros and cons when deciding to pursue a leadership position. It really comes down to personal aspirations. Many people, for myriad reasons, are happy and fulfilled with teaching. They love being in the classroom with students, and they do not want the additional responsibilities of managing others, managing more work, and solving more problems. They have no desire to be a principal. This is completely fine, and the same holds true in the corporate world. I see a lot of employees who are fantastic individual contributors and have no desire for leadership. They already exceed expectations in the individual work that they do, and that is enough for them. Moving into a managerial position really requires first asking yourself, "Do I want to take on more responsibility? Am in the right place in my personal life and career to accept more?" This is a personal question and one that a lot of times comes with having family discussions and soul searching. Before I took the plunge to start a master's program, I sat down with my daughters and we talked about it. For me, I needed that "mommy greenlight" to move forward.

Once you know you desire to make a larger impact, you need to be honest and objective with yourself regarding your ability. Do you have the ability to lead others? Do you want to make a larger or different impact? Do you feel fulfilled in your current role? The skill sets required for effectively managing a team are very different from the skills needed to manage yourself. Once you become a manager, you are responsible for everything your team touches, does, or says. It is a lot of accountability and a lot of additional work. You need to be a person who is comfortable with learning on the fly, solving problems, and making decisions. As an individual contributor, you are only responsible for yourself. When you manage others, the work is no longer about what you can accomplish but rather how you help position and inspire your team to accomplish their goals. You are

responsible for people, their lives, and those of their families. It is a large responsibility. Do you have the ability to handle tough situations and still stay positive? Are you willing to go the extra mile and do the extra work that it takes for your team? Are you willing to serve in a larger capacity?

What Would I Have Done Differently?

> "Even when you think you have your life all mapped out, things happen that shape your destiny in ways you might never have imaged."
> —*Deepak Chopra*

We all have visions of the way our lives will be, especially when you start your teaching career at 22 years old. For me, I had a series of unimaginable events that led me to where I am today. I had the teaching and mom-mapping complete, but I never in my wildest dreams thought I would have a corporate career. I would not change my pathway because I love that it is unique. However, I do wish I had been less afraid of taking risks when I was younger, because then I would have become more involved in the corporate educational field much sooner. I would have embraced researching options and diverse career opportunities rather than just believing and accepting what most people say about teaching. Some might say, "If you want to teach, you have to be with students in a classroom." I know now this statement is absolutely untrue.

Just one week before writing this chapter, I taught 200 leaders in a hotel conference room, including our CEO, about "growth mindset." The students, classroom, and content may be different. I may have been on a stage with a microphone and large monitors, but the mission was still the same—help people learn and make a connection. Make a learning impact.

What I found is that learning exists everywhere, and someone needs to teach or train for that learning to occur. So why not let it be you? I wish I had spent more time on self-discovery when I was younger, so I could have learned more about myself and then just gone for it!

Fear drove my life for a very long time. Once you break out of that and embrace a mindset that lets you be OK if you fail, you can achieve anything that you set your heart and mind to.

Summary

The role of a leader is not for the faint of heart. It can be lonely. Friends who were once your peers may start treating you differently. You are in the spotlight whether you like it or not. You will be judged, criticized, and scrutinized. If you can handle the stress and gather the mental and emotional fortitude that you need for a leadership role, the rewards and accomplishments can be great. There is nothing in the world better than watching someone you coached succeed, promoting a hard worker who is so grateful they cry in your office, or hearing that your business plan was accepted or that your CEO aligns to a strategy that came directly from your team.

I have been fortunate enough to have been given the opportunity to experience both roles. What I have learned the most is that leadership is not about perfection, but rather embracing learning every day and growing despite being imperfect.

Conclusion

Lisa Spinelli

> "A journey of a thousand miles begins with a single step."
> —*Tao Te Ching*

If you are ready for change, you have to start somewhere. For many of us, making a big change seems daunting because we are focused on the ending—making the entire journey as one giant leap. But the journey doesn't usually happen all at once. With every major change come a thousand steps beforehand. Most of those steps are small ones, and some of them you might have already made unknowingly—like reading this book!

The climb to a new career path reminds me of *Free Solo*, an award-winning 2018 documentary about professional rock climber Alex Honnold. Honnold climbs without ropes or safety nets, and his dream was to conquer El Capitan, a 900-meter vertical-faced mountain in Yosemite National Park. The climb is a series of mostly small, very calculated steps. At times he nearly leaps from one spot to another and you think he's certainly going to fall, but after having practiced for hours and days, Honnold has learned how to conquer his ultimate challenge. And while his brain doesn't exactly experience fear the same way the rest of us do (I would be passed out by step 5 and probably crying

in a puddle on the ground with a broken leg), the journey is still terrifying. Making a career leap is also terrifying (maybe not quite as terrifying as climbing a 900-meter vertical-faced mountain), but when you break it down into smaller steps, it can be more exhilarating and less petrifying than you may initially think.

As you may now see, talent development is not an entirely new field—adult education still means you are educating. The end goal—the view from above—is the same. If you think you need a career change—no matter how terrifying it might seem—then using your skills and experience to step into corporate training and development might be the right move for you. The leap is not as big as you might think; sure you will take a thousand small steps to get there and occasionally leap from one spot to another, but you won't have to conquer the entire 900 meters at once.

If you have read one, a few, or all the previous chapters, you will see there are positives and negatives to moving into talent development. We are not going to pretend that the field doesn't have its own set of challenges. But as you read, the positives for the authors of these chapters (all former K–12 teachers) have far outweighed the negatives. Some of the positives include more opportunity for career growth and salary increases, a chance to act as an entrepreneur or one-on-one coach, and the ability to more fully use your creativity as well as diversify your skill set and keep current with trends.

While you may be looking to leave teaching for clearly defined reasons, you might not know all the pluses and minuses of your new career until you get there. Like any career, you have to weigh the potential benefits with the obstacles of each role discussed in this book and consider if those obstacles are molehills in comparison to the mountains you are experiencing now.

If you are ready to make the leap, the first step is discovering what your skills are and taking an assessment. Do the Gallup StrengthsFinders assessment, a Myers-Briggs Type Indicator personality test, hire a credentialed career coach, learn where your true skills may lie—it might surprise you! Determine your personality so you can find the best fit for your next company culture and role. But don't let that personality test preclude certain roles you are assuming others match more perfectly. For example, just because you are an introvert does not mean you would be a terrible speaker—some of the best public speakers truly are introverts.

As the contributors stress, you should research, connect, and learn. Find people in the roles that match your skills, personality, and goals—or within the organizations that match those—and set up informational interviews. Make sure you research any organization you target for the future extensively. Some bad reviews online might reflect one department, some great reviews online might just be paid reviewers. Finding insiders is always the way to go.

To find the right people, first locate a good mentoring network and join it or connect to a great mentor directly through your networks. Getting a great mentor can help you immensely in a career shift—especially if they are already working at an organization (or are connected to one) you would like to join. Meet new people—potentially even a mentor—at a talent development workshop, conference, or local ATD chapter meeting. Create networks around you in the field of adult education and the roles that have piqued your interest from reading this book. Getting the right connections can make a much easier or quicker start in this field.

Don't forget social media. Many teachers are not on LinkedIn, so make sure you set up a profile there. Join groups—like the ATD Teaching to Training LinkedIn group—and follow not just prominent talent development professionals, but also local area talent development professionals. Set up coffee dates or reach out for a quick chat. You will be surprised at how many people are willing to give up their time to help a teacher in need (remember, we all have a teacher we still love dearly—I have at least four).

While you are on LinkedIn, employ good personal branding techniques. Some of the best tips you can find come from William Arruda, a pioneer in the field of personal branding and author of *Digital You*, which is chockfull of good advice. You can also follow William on Forbes.com or YouTube under CareerBlast. He has tons of ideas and tricks to get your personal brand on point.

Once you have taken these first few steps, look ahead and start making a plan. You don't have to set this plan in stone. A good career plan changes regularly in a number of ways—don't ever try to make a career plan that extends longer than a few years out when you're in the middle of transitioning your career. When people asked me about my five-year plan I would laugh. Five years? I never had anything in my life last unchanged for longer than two, tops—and now that I am married with three kids it's more like three months!

What is a good career plan? Here are some tips:

- Start with the recommended assessments and tips here and in the additional resources section. This is your discovery step. List out two or three roles you want to target, three or five organizations, and as many informational interviews as you can handle.
- List your skills and personality traits and make sure you narrow down those roles or companies to fit within them.
- Once you have a couple roles laid out, prioritize the options and compare their positives and negatives; include companies in this analysis as well. Reread the applicable chapters of this book once your desired roles are defined. Remember, connections to people in the field are your guide to what these roles really entail. Sometimes a foot in the door is all you need.
- Set deadlines for yourself. Once you have some deadlines you are more likely to stick to them. Have a set date to make your role or company choice.
- Work on your resume and pass it along to someone in the field to help you update it for corporate-speak.
- Set up job alerts and keep your eye on what is popping up at desired companies and for desired roles.
- Keep updated with your connections; don't let more than a month go by without checking in to stay near the top of their mind.
- Don't be discouraged. Everyone experiences rejection, and you may hear "No!" more than a few times before you hear "Yes!" Keep your chin up! Even Walt Disney was told once he had no imagination, so really, it's all in the eye of the beholder.

Good luck and be sure to share your story and advice on our LinkedIn Group—Teaching to Training!

Acknowledgments

The Association for Talent Development is at its roots an organization that helps others excel in their careers. The purpose for this book has always been in line with that desire to help others find and excel in their careers. But that desire could not have been fulfilled without the work and help of so many people. First I must thank Tim Ito for planting the seed of this book idea and supporting the execution of that idea. Of course I want to thank all of the contributors for their hard work and time over the last two years, which continues on today: Kari (Knisely) Word, Leah Yeatts, MJ Hall, Barb Egan, Carla Torgerson, Erik Palmer, Charles Steven Bingham, and Jenifer Calcamuggi. A big thank you also goes out to the other sources for the book who were interviewed repeatedly and put in a lot of time to help develop its ideas and concepts, including Karen Bieger, Hillarie Hunt, Matt Sustaita, Michael Freedman, Scott Pitts, Karen Vieth, as well as Amy Wallace and Emily Dennis. This book would never have been completed without the help and sturdy guidance of Kathryn Stafford and the word magic of Hannah Sternberg and the rest of the ATD Press and marketing teams. Coordinating, editing, and writing part of this, my first book, was a truly great experience and could not have been done without all these players involved.

In addition to the previous acknowledgments, the contributors of this book would also like to thank: High Point University School of Education Assistant Professors Drs. Allie Blosser, Kristy Davis, and Claire Lambert; Selma Ridgway, Fran Norris Scoble, Dot Beineix, and Tina Ruybalid.

Resume Resources

Resume Rewrite

As you begin to look at your resume, view this as your pitch as to why you should be considered in this new role and field. Think of this as your personal brand one-pager—a promotional piece for you to highlight your skills and experiences. While many recruiters consider LinkedIn your digital resume, organizations still mostly require you to submit a hard copy resume when applying for positions.

When you are rewriting your resume to have your teaching experience fit into training and talent development roles, make sure you think about the terms you are using. Are they K–12 terms? Search job titles you are interested in obtaining, such as instructional designer, corporate trainer, or leadership coach, and see what terms are they using. Can your skills be translated into those terms? Some terms in chapter 3 may apply to your resume. For example, instead of saying "students" say "learners"; instead of a "classroom" say "learning environment"; and instead of "lesson plan" say "curriculum." Changing the terminology will be the first step toward highlighting your abilities to integrate into the corporate world. You may need to translate your resume from an experience-based template into a skills-based resume.

This section features an example of an actual teacher resume and how it was transformed to obtain an instructional design position.

First, the summary and objective were transformed. If your resume contains photos or graphics, this is the step in which to remove them as well.

RESUME INTRO BEFORE

Middle School Math Teacher

Dedicated ~ Organized ~ Dependable

My goal is to make learning a positive experience where students will be actively engaged in learning while understanding the importance of education and mathematics for their future by the following:

- ***Engaging*** students in classroom discussions by creating lessons based on collaborative, discovery, and real world problem solving situations utilizing multiple modalities of learning.
- ***Motivating*** students to be responsible for their own learning by actively encouraging students and by tracking individual student mastery of skills and objectives.
- ***Managing*** a positive and safe classroom environment through consistent classroom management, parental communication, and following rules, procedures, and deadlines.

RESUME INTRO AFTER

EDUCATOR, TRAINER, INSTRUCTIONAL DESIGNER

Well known for creating a dynamic rapport and engaging learning environments by using instructional design principles in face-to-face and e-learning environments. Designed e-learning modules using Camtasia, iWeb, Photo Story for Blackboard, Moodle, and Elluminate.

WEBSITE E-PORTFOLIO: InstructionalDesignStudio.com

The education-first style resume was restructured to highlight skills:

BEFORE: EDUCATION FIRST

Certification & Education

Master's Degree in Educational Technology
University of Texas; Brownsville, TX
(Expected Graduation December of 2011)
Florida Teacher Certification
Math 5–9 (Certified 2011)
Texas Teacher Certification
Business Ed 6–12, Generalist 4–8, Math 6–8, Master Technology Teacher (Certified 2008)
Bachelor of Science in Business Management
Indiana University; Fort Wayne, IN (Graduated 2003)

AREAS OF EXPERTISE

TRAINING AND EDUCATING

- Awarded Academic Excellence Math Teacher, 2013 school year.
- Teacher of the Month, February 2013 school year.
- Only teacher at Sligh Middle School nominated for district teacher of academic excellence in math, 2012 school year.
- Demonstrated a model classroom for other teachers at the request of the Florida Department of Education & District Representatives.
- Selected as District Kagan Trainer and SpringBoard District Trainer, 2014 school year.
- Trained teachers on state-of-the-art ways to integrate technology into their lesson plans.
- Implemented Kagan cooperative learning strategies within the school system.

MANAGEMENT & LEADERSHIP

- School district administration nominated me for lead teacher and math coach for 2014 school year.
- Project manager for catering software implementation.
- Catering manager in charge of 20 employees.
- Increased catering sales in 2004 by 3% and in 2005 by 15%.
- Coached and supported a team of 4–10 teachers.
- Director of after-school program.

INSTRUCTIONAL DESIGN

- Designed e-learning modules using Camtasia, iWeb, Photo Story for Blackboard, Moodle, and Elluminate.
- Expanded district math department instructional design.
- Established innovative formatting for district math department curriculum.

The experience section was also condensed to make room for the skills:

EXPERIENCE SECTION: BEFORE

Teaching Experience

MIDDLE SCHOOL MATH TEACHER & MASTER TECHNOLOGY TEACHER
Donna Independent School District, Donna, TX;
2008–present

- Two years as a 6th grade math teacher, one year of which was in a special ed co-teaching environment
- One year as a 7th Grade math teacher
- One year as a 8th grade summer school math teacher
- Conducted staff development trainings as needed or requested
- Team leader
- PALS club leader
- Campus technology integration specialist
- Wrote district 6th grade math curriculum for two years
- Student population was 98% economically disadvantaged and spoke English as a first language (Title I)

EXPERIENCE SECTION: AFTER

7th Grade Math Teacher & After-School Director
School District of Hillsborough County; 2011–2013

6th Grade Math Teacher & Master Technology Teacher;
Donna Independent School District; 2008 – 2011

Student Loan Consultant
College Loan Corporation; 2006–2007

Catering Director
Penguin Point Catering; 2004–2006

Within the new resume, an education section along with additional or continuing education was created to highlight the new instructional design and project management certifications the former teacher obtained to make the switch. She also included all the relevant associations she joined and any relevant professional research she conducted.

You could also include volunteer work, awards, conferences you've attended, or publications you've contributed to to highlight your seriousness in moving into the new field.

Additional Resources

Associations and Industry Publications

ATD (Association for Talent Development)
td.org

Local Chapters of ATD
td.org/chapter-locator

SHRM (Society for Human Resource Management)
shrm.org

***Chief Learning Officer (CLO)* Magazine**
ChiefLearningOfficer.com

***Training* Magazine**
TrainingMag.com

Institute for Corporate Productivity (i4Cp)
i4cp.com

International Coach Federation (ICF) Credentialing Program
CoachFederation.org

Coach Training World
CoachTrainingWorld.com

Learning Guild
LearningGuild.com

Toastmasters International
toastmasters.org

Sources of Research on the Field

Deloitte Research
deloitte.com/us/en/pages/about-deloitte/solutions/center-integrated-research.html

Accenture
accenture.com/us-en/blogs/accenture-research

IBM
research.ibm.com

Center for Creative Leadership (CCL)
ccl.org

Center for Leadership Studies (CLS)
situational.com

Developmental Dimensions International, Inc. (DDI)
ddiWorld.com

Gartner Research
gartner.com/en

McKinsey Research
mckinsey.com/mgi/our-research

Blogs, Websites, and Podcasts

Other Jobs for Teachers
OtherJobsForTeachers.com

Keith Eigel and the Leaders Lyceum
LeadersLyceum.com/who-we-are/keith-eigel

A+ Resumes for Teachers
Resumes-For-Teachers.com

TeachHub.com
TeachHub.com/5-quick-steps-reflective-practice

TEFL Training Institute
TEFLTrainingInstitute.com/podcast/2017/3/20/fromteachertotrainer

Personality and Skill Assessments

Gallup CliftonStrengths
gallup.com/cliftonstrengths/en/strengthsfinder.aspx

Value Cards Activity
iCareValues.org/value_activity.htm

DiSC Assessment
TheDiSCPersonalitytest.com

Hogan Assessment
HoganAssessments.com

High5
High5Test.com

Skillcheck
SkillCheck.com

VIA Character Assessment
VIACharacter.org

Myers Briggs Personality Indicator (MBTI)
MyersBriggs.org/my-mbti-personality-type/take-the-mbti-instrument

Emotional Intelligence 2.0 Assessment
TalentSmart.com/test

IBM Learning Agility Assessment
ibm.com/nl-en/talent-management/assessment-tests

The Highlands Company Highland Ability Battery (HAB)
HighlandsCo.com/whats-highlands-ability-battery

MHS (Multi-Health Systems) Talent Assessment Portal
tap.mhs.com

Paradigm Personality Labs Workplace Big Five Profile
ParadigmPersonality.com/products/workplace-big-five-profile

Job Sites

ATD Job Bank
jobs.td.org

SHRM Job Site
jobs.shrm.org

E-Learning Industry Jobs
eLearningindustry.com/jobs

Online Learning, Certifications, and Certificate Programs

ATD

Currently, ATD offers approximately 40 certificates from instructional design and e-learning all the way through training delivery, sales enablement, change management, and performance consulting.

It also offers two certifications: the Certified Professional in Talent Development (CPTD, formerly CPLP) and the Associate Professional in Talent Development (APTD). A certification is validation of a status achieved and is signified by credentials being placed after your name. td.org/education-courses

International Coaching Federation Program Lookup Tool

Apps.CoachFederation.org/eweb/DynamicPage.aspx?webcode=TPSS

SHRM Courses

store.shrm.org/education

Online Learning Consortium

OnlineLearningConsortium.org/learnid-certificate-or-mastery-series-which-program

LinkedIn Learning

linkedin.com/learning

Coursera

coursera.org

Udemy

udemy.com

Check out local university extension schools and community colleges for classes, microcredentialing and other classes in the field.

Books

E-Learning Department of One
Emily Wood

Design for How People Learn
Julie Dirksen

The Accidental Instructional Designer
Cammy Bean

E-Learning Fundamentals
Diane Elkins and Desiree Pinder

Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization (Leadership for the Common Good)
Robert Kegan and Lisa Lahey

Changing on the Job: Developing Leaders for a Complex World
Jennifer Garvey Berger

Switch: How to Change Things When Change Is Hard
Chip Heath

Frames of Mind: The Theory of Multiple Intelligences
Howard Gardner

The Gifts of Imperfection: Let Go of Who You Think You're Supposed to Be and Embrace Who You Are
Brené Brown

The Map
Karl W. Kuhnert and Keith M. Eigel

Thanks for the Feedback, I Think: My Story About Accepting Criticism and Compliments the Right Way! **(Best Me I Can Be! series)**
Julia Cook

Strengths-Based Leadership: Great Leaders, Teams, and Why People Follow
Tom Rath and Barry Conchie

Creating a Culture of Reflective Practice: Capacity-Building for Schoolwide Success
Pete Hall and Alisa Simeral

The Reflective Practice Guide
Barbara Bassot Routledge

Up Is Not the Only Way: Rethinking Career Mobility
Beverly Kaye, Lindy Williams, and Lynn Cowart

Videos

"Brene Brown on the Power of Vulnerability"
ted.com/talks/brene_brown_on_vulnerability?language=en

"Robert Kegan on Developmental Theory"
YouTube.com/watch?v=bhRNMj6UNYY

"CIPD, Introduction to Reflective Practice"
YouTube.com/watch?v=M9hyWVEG2x0

Learning and Talent Development Models

Coaching Models

GROW (Mind Tools)
MindTools.com

CIGAR (Full Potential Group)
FullPotentialGroup.com/product/fpg-coach-book-and-cigar-card

CLEAR (Peter Hawkins)
Personal-Coaching-Information.com/clear-coaching-model.html

ACHIEVE (Sabine Dembkowski and Fiona Eldridge)
CoachCampus.com

OSCAR (Karen Whittleworth and Andrew Gilbert)
WorthLearning.co.uk

STEPPA (Angus McLeod)
AngusMcLeod.com/wp-content/uploads/2016/01/STEPPPA_Coaching_Model.pdf

STEER
ManageTrainLearn.com/article/the-7-cs-of-coaching

COACH (Keith Webb)
KeithWebb.com/coach-model

GAIN
TheExecutiveAdvisory.com/toolkit/communication-templates/feedback/the-gain-model

Gallup Strengths Coaching
courses.gallup.com/strengths-coaching-certification

ITC (Kegan and Lahey)
MindsAtWork.com

Instructional Design and Evaluation Models

The most common instructional design model, ADDIE, is covered extensively in earlier chapters of this book; this section shares several other models and variations.

ASSURE Model

A six-part model to instructional design. Stands for:

- Analyze learners
- State standards and objectives

- Select strategies, technology, media, and materials
- Utilize technology, media, and materials
- Require learner participation
- Evaluate and revise.

Find more information on this model, visit sites.google.com/a/nau.edu/learning-theories-etc547-spring-2011/theory/assure-model-1.

Bloom's Taxonomy of Instructional Objectives

A very popular framework for classifying instructional objectives into three hierarchies. Named after Benjamin Bloom, an educational psychologist who chaired the educational committee that published the first book to contain this model.

The three levels in the model are:

- Knowledge based
- Emotion based
- Action based

Find out more on this model by taking a self-paced course from ATD at td.org/education-courses/blooms-taxonomy.

Dick, Carey, and Carey System Design Model

A systems approach to instructional design. The steps of the nine-part model are:

- Assess needs/identify instructional goals
- Conduct instructional analysis
- Analyze learners
- Write performance objectives based on preceding findings
- Develop assessment tools and tests
- Develop instructional strategy
- Develop and select instructional materials
- Design and conduct a formative evaluations
- Revise instruction

More information can be found in *The Systematic Design of Instruction*, 7th ed., by Walter Dick, James Carey, and Lou Pearson Carey (2008).

Gagné's Nine Events of Instruction

A model for designing instruction created by educational psychologist Robert Gagné. The nine events are:

- Gaining attention of students
- Inform students of objectives
- Stimulate recall of prior learning
- Present the content
- Provide learning guideance
- Elicit performance (practice)
- Provide feedback
- Assess performance
- Enhance retention and transfer to the job

For more information, see *The Conditions of Learning and Theory of Instruction* by Robert Gagné (1985).

Keller's ARCS Theory of Motivational Design

A framework for designing instruction to maximize learner motivation. ARC stands for:

- Attention
- Relevance
- Confidence

For more information, see *Motivational Design for Learning and Performance: The ARCS Model Approach* by J.M. Keller (2010).

KEMP Instructional Design Model

A framework for instructional design using nine components. Find out more at InstructionalDesign.org/models/kemp_model.

Kirkpatrick's Levels of Evaluation

A model for evaluating the effectiveness of learning based on four levels. Higher levels measure how much knowledge stuck with the learner. The levels are:

- Level 1, Reaction: opinions from learners
- Level 2, Learning: measure or test what they learned
- Level 3, Behavior: see if the learners have changed their behavior from the lessons
- Level 4, Results: tangible results as an effective of the learning event.

For more information, visit td.org/FourLevels and read *Kirkpatrick's Four Levels of Training Evaluation* by Wendy and Don Kirkpatrick (2016).

Merrill's First Principles of Instruction

A set of instructional design principles based on the following five guidelines:

- **Task/problem-centered:** Students learn better when the tasks are centered around problem-solving and go from simple to complex.
- **Activation:** Recalling information or events helps students retain the learning.
- **Demonstration:** Students learn more when the new information is presented in a real-world scenario rather than rote memorization.
- **Application:** When students apply the new learning in a real-world setting, they are more likely to retain the information and receive feedback.
- **Integration:** Students learn more when they are encouraged to integrate their new knowledge into their life through reflection, discussion, debate, and/or presentation of new knowledge.

More information found in *First Principles of Instruction* by D.M. Merrill (2012).

Successive Approximation Model (SAM)

An Agile or iterative version of ADDIE. You can learn more about this in chapter 4, and by reading *Leaving Addie for SAM: An Agile Model for Developing the Best Learning Experiences* by Michael W. Allen (2012).

Universal Design for Learning (UDL)

A way of thinking which leads to a more flexible design of instruction. The main principles of UDL are:

- Representation
- Action and expression
- Engagement

This methodology gives students and learners more choice and creates opportunities to motivate all learners. More information can be found by reading *Universal Design for Learning in the Classroom: Practical Applications (What Works for Special-Needs Learners),* 1st ed., edited by Tracey E. Hall, Anne Meyer, and David H. Rose (2012).

Glossary

6 Thinking Hats: A system designed for group discussion and individual thinking. Created by Edward de Bono.

Agile Methodology: Started as a software development practice with the customer-first mentality that harnesses adaptability and innovation to create nimble products and teams that are sustainable yet progressive.

Andragogy: (From the Greek meaning "adult learning.") Also called adult learning theory, as popularized by Malcolm Knowles, based on five key principles that influence how adults learn: self-concept, prior experience, readiness to learn, orientation to earning, and motivation to learn.

Asynchronous Learning: A form of learning in which interaction between instructors and students occurs intermittently with a time delay.

Business Acumen: According to MarketBusinessNews.com, a skill some people have to identify what to focus on in a business, and how to go about making sure it becomes successful.

Career Coaching: Provides support for employees looking to make a career transition, whether short or long term, including guidance on their professional development and job search. Career coaches may help with resume writing, job searches, online profiles, and job interviewing.

Change Management: The process of guiding people affected by change from awareness through engagement to commitment to the change.

Competency-Based Learning: Focuses on the learner, with heavy emphasis on individual learning plans. Features of competency-based learning are occupational analysis of competencies required for successful performance, validation of competencies, learner awareness of criteria and conditions for adequate or excellent performance, and planning for individual instruction and evaluation for each competency.

Compliance: Mandatory requirements for workplace regulatory training as required by law or professional governing standards. The Occupational Safety and Health Administration Standards–29 CFR 1926, the Health Insurance Portability and Accountability Act, and Sarbanes-Oxley are three examples of regulations that require compliance training.

Digital Literacy: Fluency with using technology programs such as the Microsoft suite, collaboration platforms such as Zoom, social media protocols, and apps to access data and share information with others is a necessity—especially with the growth of remote workers; awareness of learning management systems including aggregators; and understanding the effects of emerging technologies such as virtual reality and artificial intelligence.

Eisenhower Box: Also called the Eisenhower Decision Principle, is a method of evaluating and listing tasks according to whether they are important or not important and urgent or not urgent. The name derives from Dwight D. Eisenhower, five-star general in the U.S. Army.

E-Learning Professional: Someone who structures coursework and learning experiences that are delivered electronically.

Emotional Intelligence: *Psychology Today* defines this as "the ability to identify and manage one's own emotions as well as the emotions of others."

Facilitation: Refers to the trainer's role in the learning process—helping learners acquire, retain, and apply knowledge and skills.

Graphic Design: The art or profession of using design elements (such as typography and images) to convey information or create an effect (from *Merriam-Webster* online)

Growth Mindset: A concept developed by psychologist Carol Dweck, *Harvard Business Review* sums it up by saying: "Individuals who believe their talents can be developed (through hard work, good strategies, and input from others) have a growth mindset." MJ Hall, a contributor to this book, describes it as being curious and chasing that curiosity with self-directed learning, reflection, and feedback; being open to new ideas and possibilities and taking risks; learning from mistakes.

Instructional Designer: A person who uses systematic methodology (rooted in instructional theories and models) to design and develop content, experiences, and other solutions to support the acquisition of new knowledge or skills.

Johari Window: A quadrant-based technique for understanding oneself better. The quadrants are measured on known to others, not known to others, known to self and not known to self. If you are known to others and yourself you are in the arena, if you are known to others and not yourself, there are blind spots—things you don't see about yourself; if you are unknown to others and known to yourself you are masking or hiding things; and if you are unknown to yourself and others you are unconscious of yourself and others.

Kanban Principles: A scheduling system for lean manufacturing, originating from the Toyota Production System. In the late 1940s, Toyota introduced "just in time" manufacturing to their production. Now this idea has evolved into four principles: start with what you do now; agree what the evolutionary change is; respect the current process and roles; and encourage acts of leadership.

Leadership Coaching: Provides coaching for those looking to grow and develop leadership skills, regardless of whether they are an individual contributor, manager, or senior manager.

Life Coaching: While not the most popular type of coaching within an organization, life coaches are still sometimes present internally. This specialty of coaching focuses on a variety of aspects of life, including career, health and fitness, finances, relationships, and spiritual growth.

LMS (Learning Management System): Consists of software that automates the administration of training. The LMS registers users, tracks courses in a catalog, records data from learners, and provides reports to management. An LMS typically is designed to handle courses by multiple publishers and providers.

Networking: According to the *Merriam-Webster* dictionary, the definition is: "the cultivation of productive relationships for employment or business." We consider there to be three types: Operational networking involves building relationships with people you do business with on a regular basis, from suppliers to colleagues. Personal networking helps you find support when you go through rough patches in your career and personal life. Strategic networking happens when you target someone who would add a specific benefit to your network.

Organization Development (OD): The work of the organization development professional is to improve the way in which their organization functions, with the help of a systems-thinking perspective and a set of values about how people and organizations produce their best work. OD professionals use behavioral sciences theories and research to improve their organizations and individual success.

Organizational or Business Coaching: Provides business owners and entrepreneurs with support in identifying goals, creating strategies to obtain those goals, and boosting the overall performance of the organization.

Pedagogy: Refers to the science and theory of teaching and learning. Usually refers to teaching children.

Performance Coaching: Supports those within organizations who need to improve their work performance, often as a result of performance appraisal results, regardless of level or job title.

Performance Consultant: A person who works with organizations to help improve process and project initiatives, according to ZipRecruiter.

Project Management: The planning, organizing, directing, and controlling of resources for a finite period of time to complete specific goals and objectives.

SDL (Self-Directed Learning): Individualized, or self-paced learning that occurs through programs that use a variety of delivery media, ranging from print products to web-based systems. It also can refer to less formal types of learning such as team learning, knowledge management systems, and self-development programs.

Six-Sigma Methodology: A process improvement strategy and measure of quality that strives for perfection. Six-Sigma is a disciplined, data-driven methodology for eliminating defects (driving toward six standard deviations between the mean and the nearest specification limit) in a process. The fundamental objective of the Six-Sigma methodology is the implementation of a measurement-based strategy that focuses on process improvement and variation reduction through the application of projects.

Start and Stop Model, also called **Stop Start Continue:** A change management model used for service improvement.

Subject Matter Expert (SME): SME is the universal designation for any individual who is considered to be an expert in one or more areas of endeavor. This expertise can be in content areas such as math or science, or a professional field such as law or accounting. A SME can also be a key non-content member of a training or instructional design team.

Synchronous Training: Occurs when the trainer and the trainee interact in real time. It sometimes refers to electronic or web-based training that involve live interaction between trainers and learners (VILT).

Talent Development: The efforts that foster learning and employee development to drive organizational performance, productivity, and operational results.

Talent Management: A holistic approach to optimizing human capital, which enables an organization to drive short- and long-term results by building culture, engagement, capability, and capacity through integrated talent acquisition, development, and deployment processes that are aligned to business goals.

Trainer: Someone who trains or instructs others; in this book's case, adults.

VILT or **Virtual Instructor-Led Training:** Real-time training where the learners are in their own locations, but log into an online site at the same time. The facilitator can still lead the instruction, showing visual aids and leading discussions and activities with the class, but does so virtually.

References

Preface

Page, S. 2020. "Back to School? 1 in 5 Teachers Are Unlikely to Return to Reopened Classrooms This Fall, Poll Says." *USA Today*, May 26. usatoday.com/story/news/education/2020/05/26/coronavirus-schools-teachers-poll-ipsos-parents-fall-online/5254729002.

Introduction

Chang, A. 2018. "Teacher pay is falling. Their health insurance costs are rising." Vox, March 16. vox.com/2018/3/16/17119366/teacher-health-insurance-cost-rising-data.

Education Week. 2018. "The Teaching Profession in 2018." December 14. blogs.edweek.org/teachers/teaching_now/2018/12/the_teaching_profession_in_2018_in_charts.html.

Hackman M., and E. Morath. 2018. "Teachers Quit Jobs at Highest Rate on Record." *Wall Street Journal*, December 28. wsj.com/articles/teachers-quit-jobs-at-highest-rate-on-record-11545993052.

Hess, A. 2018. "In Oklahoma you can make more money working at a gas station than as a teacher." CNBC Make it, March 7. cnbc.com/2018/03/07/many-oklahoma-teachers-earn-less-than-gas-station-workers.html.

Ingersoll, R. 2018. "44 percent of New Teachers Quit." *Education Week*, October 23. blogs.edweek.org/edweek/teacherbeat/2018/10/today_teaching_force_richard_ingersoll.html.

Leachman, M., K. Masterson, and E. Figueroa. 2017. "A Punishing Decade for School Funding." Center on Budget and Policy Priorities, November 29. cbpp.org/sites/default/files/atoms/files/11-29-17sfp.pdf.

Mulhere, K. 2018. "These 7 Charts Explain the Fight for Higher Teacher Pay." *Time*, April 11. time.com/money/5228237/teacher-pay-charts.

PDK International. 2019. "Frustration in the schools: Teachers speak out on pay, funding and feeling valued." PDK poll of the Public's Attitudes Toward Public Schools, September. pdkpoll.org/assets/downloads/2019pdkpoll51.pdf.

Phillips, O. 2015. "Revolving Door Of Teachers Costs Schools Billions Every Year." National Public Radio, March 30. npr.org/sections/ed/2015/03/30/395322012/the-hidden-costs-of-teacher-turnover.

Chapter 1

Bingham, T. 2014. "Talent Development." ATD Insights, May 21. td.org/insights/talent-development.

Bureau of Labor Statistics, U.S. Department of Labor. 2019. "Training and Development Managers." In *Occupational Outlook Handbook*. bls.gov/ooh/management/training-and-development-managers.htm.

Wikipedia. nd. "Malcolm Knowles." en.wikipedia.org/wiki/Malcolm_Knowles.

Chapter 2

Broad, M.I., and J.W. Newstrom. 1992. *Transfer of Training: Action Packed Strategies to Ensure High Payoff from Training Investment*. New York: Perseus Publishing.

Bureau of Labor Statistics, U.S. Department of Labor. 2019. "Training and Development Managers." In *Occupational Outlook Handbook*. bls.gov/ooh/management/training-and-development-managers.htm.

Deloitte. 2019. "Human Capital." deloitte.com/us/en/pages/human-capital/topics/human-capital.html?icid=top_human-capital.

Gray, D., S. Brown, and J. Macanufo. 2010. *Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers.* Sebastopol, CA: O'Reilly Media.

Hall, M.J., and D. Holt. 2018. "Learning at the Moment of Need." ATD Insights, November 1. td.org/insights/learning--at-the-moment-of-need.

Hart, J. 2020. "The 4 D's of Learning: A quick illustrated guide to Modern Workplace Learning." April 28, Modern Workplace Learning 2020. modernworkplacelearning.com/magazine/4-ds-of-learning-quick-guide.

Chelovechlov, A., B. Spar, R. Lefkowitz, and A. Van Nuys. 2019. "2019 Workplace Learning Report." LinkedIn Learning. learning.linkedin.com/content/dam/me/business/en-us/amp/learning-solutions/images/workplace-learning-report-2019/pdf/workplace-learning-report-2019.pdf.

Peister, B., and B. Van der Vyler. 2017. "Careers and Learning: Real Time, All the Time." Deloitte (Blog), June 9. deloitte.com/global/en/pages/about-deloitte/articles/careers-and-learning-real-time.html.

Chapter 3

Association for Talent Development. n.d. "What is Instructional Design." TD Glossary. td.org/talent-development-glossary-terms/what-is-instructional-design.

Bureau of Labor Statistics, U.S. Department of Labor. 2019. "Training and Development Managers." In *Occupational Outlook Handbook*. bls.gov/ooh/management/training-and-development-managers.htm.

CNN Money Staff. 2012. "Best Jobs in America: 38: Instructional Designer." CNN Money, October 29. money.cnn.com/pf/best-jobs/2012/snapshots/38.html.

eLearning Guild. 2014. "Today's Instructional Designer: Competencies and Careers." eLearning Guild. elearningguild.com/insights/178/todays-instructional-designer-competencies-and-careers.

eLearning Guild. 2018. *Global eLearning Salary and Compensation Report.* eLearning Guild. elearningguild.com/insights/223/2018-global-elearning-salary-compensation-report.

Klein, J., and W. Kelly. 2018. "Competencies for Instructional Designers: A View from Employers: Competencies for ID." *Performance Improvement Quarterly* 31: 225–247. 10.1002/piq.21257.

Knisely, K. 2019. "Other Jobs for Teachers." otherjobsforteachers.com/transition-into-training-and-development-or-instructional-design.

Molenda, M. 2015. "In Search of the Elusive ADDIE Model." *Performance Improvement* 54(2): 40–42. doi-org.proxy.lib.fsu.edu/10.1002/pfi.21461.

Molenda, M. 2017. "Historical Foundations." In *Handbook of Research on Educational Communications and Technology,* edited by J. Michael Spector, M. David Merrill, Jeroen van Merriënboer and Marcy P. Driscoll. New York: Routledge.

Olsen, J.R., and V.B. Bass. 1982. "The Application of Performance Technology in the Military: 1960-1980." *Performance & Instruction* 21(6): 32. search.ebscohost.com.proxy.lib.fsu.edu/login.aspx?direct=true&db=edb&AN=90997669&site=eds-live&scope=site.

Reiser, R.A., and J.V. Dempsey. 2018. *Trends and Issues in Instructional Design and Technology,* 4th ed. New York: Pearson.

Smolen, T. 2018. *2018 Global eLearning Salary & Compensation Report.* Santa Rosa, CA: The Learning Guild.

Chapter 4

Association for Talent Development. 2019. *2019 Talent Development Salary and Benefits Report.* Alexandria, VA: ATD Press.

Bozarth, J. 2018. "eLearning Salary and Compensation: Advice for Workers, Recruiters, and Hiring Managers." Learning Guild. elearningguild.com/showfile.cfm?id=6258.

McCue, T.J. 2018. "E Learning Climbing To $325 Billion by 2025 UF Canvas Absorb Schoology Moodle." *Forbes*, July 31. forbes.com/sites/tjmccue/2018/07/31/e-learning-climbing-to-325-billion-by-2025-uf-canvas-absorb-schoology-moodle/#4aed278a3b39.

Robinson, S. 2017. "E-Learning Is on the Rise—How Can Organizations Get the Most Out of It?" ATD Insights, September 27. td.org/insights/e-learning-is-on-the-risehow-can-organizations-get-the-most-out-of-it.

Chapter 5

Coaching Training World. 2019. "10 Trends that Will Impact the Future of Coaching." Coach Training World, June 26. coachtrainingworld.com/10-trends-that-will-impact-the-future-of-coaching/.

Kegan, R., and L. Laskow. 2009. *Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization*. Boston: Harvard Business Review Press.

Kuhnert, K., and K. Eigel. 2016. *The Map: Your Path to Effectiveness in Leadership, Life, and Legacy,* 1st ed. Friendswood, TX: Baxter Press.

Hampl, P. 2018. *The Art of the Wasted Day.* New York: Viking.

Mezirow, J. 2000. *Learning as Transformation: Critical Perspectives on a Theory in Progress.* San Francisco: Jossey-Bass.

Ruth, M. 2019. "Helping Leaders Embrace Change Through Coaching." ATD Insights, January 24. td.org/insights/helping-leaders-embrace-change-through-coaching.

Chapter 6

Bersin, J. 2017. "Watch Out Corporate Learning: Here Comes Disruption." *Forbes*, March 28. forbes.com/sites/joshbersin/2017/03/28/watch-out-corporate-learning-here-comes-disruption/#a4d3337dc59f.

Freifeld, L., ed. 2018. "Training Industry Report." *Training Magazine*. trainingmag.com/trgmag-article/2018-training-industry-report.

Global Market Insights. 2019. "E-Learning Market to Surpass $300 BN by 2015." Globe News Wire, March 6. globenewswire.com/news-release/2019/03/06/1748554/0/en/E-Learning-Market-to-surpass-300bn-by-2025-Global-Market-Insights-Inc.html.

National Association of Colleges and Employers. 2020. "NACE." naceweb.org.

Training Industry. 2020. "Sive of the Training Industry Overview." Training Industry, April 1. trainingindustry.com/wiki/outsourcing/size-of-training-industry.

Chapter 7

Biech, E., ed. 2014. A*STD Handbook: The Definitive Reference for Training & Development*. Alexandria, VA: ASTD Press.

Berry, B., A. Byrd, and A. Wieder. 2013. T*eacherpreneurs: Innovative Teachers Who Lead but Don't Leave*. San Francisco: Jossey-Bass.

Brown, P.C., H.L. Roediger, and M.A. McDaniel. 2014. *Make It Stick: The Science of Successful Learning*. Cambridge, MA: Harvard University Press.

Chronicle of Higher Education. 2019. *The Almanac of Higher Education 2019-20*. August, *The Chronicle of Higher Education*, LXV:40.

National Center Education Statistics. 2012. "Table 315. Doctor's degrees conferred by degree-granting institutions, by field of study: Selected years, 1970–71 through 2010–11." *Digest of Education Statistics 2012*. nces.ed.gov/pubs2014/2014015_3.pdf.

National Center for Education Statistics. 2018. "Table 324.10. Doctor's degrees conferred by postsecondary institutions, by field of study: Selected years, 1970-71 through 2016-17." *Digest of Education Statistics 2018*. nces.ed.gov/programs/digest/d18/tables/dt18_324.10.asp.

Kaplan, R.S., and D.P. Norton. 1996. *The Balanced Scorecard: Translating Strategy Into Action*. Boston: Harvard Business School Press.

Kaye, B., L. Williams, and L. Cowart. 2017. *Up Is Not the Only Way: Rethinking Career Mobility*. San Francisco: Berrett-Koehler Publishers.

Kolb, D., and M.S. Plovnick. 1974. "The Experiential learning theory of career development." Working paper #705-74. Cambridge: Massachusetts Institute of Technology.

McGee, J. 2015. *Breakpoint: The Changing Marketplace for Higher Education*. Baltimore, MD: Johns Hopkins University Press.

Maxwell, J.C. 2000. *Failing Forward: Turning Mistakes Into Stepping-Stones for Success*. New York: HarperCollins.

National Center for Educational Statistics. 2018. "The Condition of Education 2018." nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2018144.

North Carolina State Board of Education. 2013. "North Carolina standards for school executives." dpi.state.nc.us/docs/district-humanresources/evaluation/standardsadmin.pdf.

Rath, T., and B. Conchie. 2008. *Strengths-Based Leadership: Great Leaders, Teams, and Why People Follow Them*. New York: Gallup Press.

Tharpe, T. 2006. *The Creative Habit: Learn It and Use It for Life*. New York: Simon & Schuster.

Chapter 8

Association for Talent Development (ATD). 2016. *ACCEL: The Skills That Make a Winning Manager*. Alexandra, VA: ATD Press.

Association for Talent Development (ATD). 2019. *2019 Talent Development Salary and Benefits Report*. Alexandra, VA: ATD Press.

Arets, J., C. Jennings, and V. Heijnen. 2018. "WHITEPAPER: 70:20:10 into action." 70:20:10 Institute. 702010institute.com/wp-content/uploads/2018/11/Primer-702010-into-action.pdf.

Cole, M. 2016. "New From ATD Research: The 5 Skills for Managerial Success." ATD Insights, November 14. td.org/insights/new-from-atd-research-the-5-skills-for-managerial-success.

About the Contributors

Steven Bingham

Charles Steven Bingham, PhD, is a professor at Stout School of Education at High Point University, where he teaches courses in organizational leadership, culture, and political systems; chairs doctoral dissertations; and serves on Graduate Council. He is developer and facilitator for North Carolina Principals and Assistant Principals Association Distinguished Leadership in Practice and Future-Ready Leadership and serves on the Executive Committee of North Carolina Association of School Administrators and as Executive Director of North Carolina Professors of Educational Leadership. Steve is the founding editor of the *Journal of Organizational and Educational Leadership* and director emeritus of Triangle Leadership Academy in Raleigh, North Carolina. Prior to his role at the Academy, Steve was director of program on education leadership with SERVE Center at the University of North Carolina at Greensboro. During his public-school tenure, Steve served as a principal. In that capacity he engaged staff and community to implement arts-infused curricula and to earn charter membership in A+ Schools. As teacher, Steve was twice awarded American School Band Directors Association Young High School Band Director of the Year. Credited with authoring or co-authoring 29 monographs, journal articles, books, book chapters, and grant proposals in excess of $60 million, Steve earned a doctorate in

educational leadership from University of North Carolina Greensboro. He lives with wife Deborah in Jamestown, North Carolina.

Jenifer Calcamuggi

Jenifer Calcamuggi is the director of enterprise learning and organizational development at Office Depot. For more than 20 years, her innovative involvement in the educational, entrepreneurial, and corporate industry has led her to the belief that there is a designer in all of us and the only thing that differentiates us is the canvas we create on. Jenifer specializes in leadership development programming as well as designing enterprise-wide learning frameworks inclusive of learning environments, pedagogy, strategy, and technology. Before working at Office Depot, she was an educator for 17 years, an entrepreneur, and a homemaker.

Barbara Egan

Barbara Egan focuses on creating a vibrant consulting experience dedicated to bringing the best in effective leadership and management tools to educational institutions and other not-for-profits. With more than 30 years of experience in public and private education, Barbara has successfully led workshops, designed leadership curriculum, trained new personnel, trained trainers, mentored and coached key school administrators, consulted with boards, and helped schools move to more efficient and effective management and to creative new leadership models. In addition to significant school experience, Barbara is a certified Strengths Coach (Gallup), and a certified facilitator of the Immunity to Change process (Kegan). She also holds a certificate in change management from Georgetown University. Barbara has served educational institutions for more than forty years. She started as a classroom teacher and subsequently served in senior leadership positions in independent schools for more than 35 years. Since 2001, she has held the position of vice president of finance and administration at Woodward Academy in Georgia.

MJ Hall

A strategist, performance coach, and business learning advisor, MJ Hall is senior project manager with the ATD Forum. Her expertise includes

designing, developing, and facilitating innovative collaborative employee experiences for delivering organizational results. Prior to ATD, MJ served as a Level IV professor, director of leadership development, and special assistant to the commandant at the Defense Acquisition University, Ft. Belvoir, Virginia. MJ has also held numerous operational assignments with other military branches within the Department of Defense. MJ has a PhD in educational leadership from George Mason University, an MBA from Long Island University, an MEd from the University of Maryland, and a BA in teaching from High Point University. She has certificates in design thinking from the Darden School of Business and LUMA Institute and was an examiner for the Baldrige National Quality Award for more than 10 years. She is the co-editor of *Leading the Learning Function: Tools and Techniques for Organizational Results* (ATD Press, 2020), author of *Designing WorkLearn Networks: Making Your Magic Happen* (2014), and more than 100 articles, blogs, chapters, and reports. She has served as a keynote speaker and has spoken at numerous conferences, including internationally. Among her many honors MJ was awarded the DoD Exceptional Civilian Medal, the U.S. Vice President's Hammer Award for Innovative Practice, and the 2017 HPU Alumni Service Award.

Erik Palmer

Erik Palmer is an author, speaker, and consultant from Colorado. His work history includes trading on the floor of a Chicago commodity exchange and managing an office for a prominent Chicago commodity brokerage firm, becoming the firm's national sales leader. He taught in one of Colorado's premier school districts where he was honored as teacher of the year. In his current career, he focuses on improving all types of oral communication: one-to-one, small group, large group; informal or formal; in-person or via digital tool. Erik shares practical ideas that enable all adults to design effective presentations and dynamically deliver those presentations. He is a frequent presenter at conferences and has led trainings across the United States and around the world. His educational background includes Oberlin College, University of Denver Law School, and the University of Colorado. Erik's latest book is *Own Any Occasion: Mastering the Art of Speaking and Presenting* (ATD Press, 2017).

Carla Torgerson

Carla Torgerson has more than 15 years of experience as an instructional designer and instructional strategist. Always interested in the latest learning trends, she has authored numerous blogs and articles on a variety of topics, including e-learning, mobile learning, and microlearning. She also developed MILE, the MIcroLEarning Design Model and is the author of *The Microlearning Guide to Microlearning* and *Designing Microlearning*. Carla has an MEd focused on technology-based education. She also has an MBA, which helps her to see training through a business lens. Carla is currently a director of instructional design at Bull City Learning, a specialized e-learning agency that provides digital learning solutions for companies in a wide range of industries, as well as nonprofit organizations. Connect with Carla on LinkedIn for insights and announcements at linkedin.com/in/carlatorgerson.

Kari (Knisely) Word

Kari Word is a former middle school math teacher turned instructional designer who started her own instructional design company where she helps her clients create solutions for their learning and performance needs. She is actively involved on the board of her local ATD Florida Suncoast chapter in Tampa, Florida.

Leah Yeatts

Leah Yeatts has more than a decade of experience working in corporate learning and public education. She holds a BS from the University of Florida and an MS in organizational performance and workplace learning from Boise State University. Leah lives in Tampa, Florida, where she is owner and principal consultant at Lever Performance Consulting.

Index

Page numbers followed by *f* or *t* refer to figures and tables, respectively.

B

C

D

E

F

O

P

R

S

T

U

V

W

Y

Z

About the Editor

Lisa is a senior content manager at ATD and the host of *The Accidental Trainer* podcast. Prior to joining ATD, she worked as a content strategist, editor, and journalist for more than 14 years. She has managed teams, websites, and social media accounts and had articles published with *Fast Company, Huffington Post, Mental Floss, Northern Virginia Magazine, Houston Chronicle, St. Louis Post-Dispatch,* and the Associated Press, to name a few. She resides in Northern Virginia with her three divas and USAF veteran husband. Follow her on Twitter @atdcareerdev.