

Leveraging Work Flow

When you know the state of your work flow, everything runs more smoothly.

DO YOU KNOW the state of your work flow?

You will need to be able to answer this question resolutely and unequivocally if you want to leverage workflow learning in your organization.

There are many people intrigued by the buzz surrounding workflow learning who cannot explain their own work flow lucidly. For these people, trying to harness the power of workflow learning is, and will continue to be, an exercise in futility. If you are trying to saturate learning into the processes, systems, tools, and equipment that comprise your work flow, it makes sense that, at a minimum, you should be able to map and describe your work flow...well.

Like many other technology-enabled learning systems and processes, workflow learning is highly fallible if the human processes that comprise the foundation of all work and learning are misaligned, bureaucratic, redundant, inefficient, or in any other way broken. This article will provide an overview of workflow learning concepts.

If you have read any of the training magazines, been to any recent training conferences, or just been conducting learning and training searches on the web, you have no doubt run across the notion of workflow learning. Like the definition for "competency(ies)" in the learning and performance world, no two workplace learning professionals will have the same definition for workflow learning.

For the purposes of this article, I define *workflow learning* as poly-modal learning and performance opportunities that leverage technology, social networks, collaboration, performance support, and convergence to enable a "learning surround" in conjunction with the learner's actual work flow. While this may seem like a heady definition, this notion of a learning surround

is key because it parallels reality more than traditional prescriptive learning interventions.

Should the learner always be required to go to some classroom to learn a new skill or to gain new knowledge? If the learner needs to be able to leverage a new software application, wouldn't it be easier to get the requisite information integrated into the application, just prior to needing to know how to use it?

Guiding principles

As with most operational models, there are principles associated with them that establish their framework. This framework provides the foundation for the ultimate model that gets fleshed out by the organization or entity using it. Workflow learning principles include:

High-level networking concepts. Work flow can be deconstructed into concepts similar to those of networks with nodes. This provides an ideal method for modeling.

Personalization. Learning creates higher impact when it has relevance and context for the end-user. There is a tremendous amount of information in the environment and less-personalized information often gets ignored by the receiver.

Embedded learning. Learners have less time to disengage from their work and work spaces today. Whenever and wherever possible, it is highly desirable to embed learning tools, systems, and information into the actual tools and systems used by the learner. Diagnostic tools used by auto mechanics and order management systems (or order configurators) are great examples of embedded workplace learning tools.

Task-level-based modeling. The ability to break content and learning into its smallest component parts requires some task-level-based modeling. Learning

technologists can provide learning in small chunks, just-in-time for the end-user, which often is enough information to move the learners forward in their current task.

Business and workforce analytics. Now more than ever, companies and organizations are demanding metrics that supersede typical training management metrics. What value to a business leader is there in knowing that 150 of his managers took project management training in the last six months? A better business-focused metric might be that based on the project management training managers took in the last six months, project planning has improved by 12 percent, which equates to a value of \$600,000. There are more tools and systems inside companies that help provide these types of analytics, for example Salesforce.com, Siebel, Quick Arrow, SAP, and Peoplesoft. There will be a time when business measurement and learning measurement will reach parity and the phrase "learning metric" will be a part of the historical training vernacular.

Real collaboration. Thomas Friedman's most recent book title says it all: *The World is Flat*. People are working in all parts of the world and technology is making it very easy for people all over the world to be highly productive information workers. Many people are working virtually. Collaboration has to be instantaneous with co-workers and clients alike. There are many applications and tools used for these purposes from instant messaging to virtual collaboration tools (like WebEx, LiveMeeting) and tele- and video-conferencing. The PC is not the only access point for collaboration. It is happening through cell phones, handheld gaming devices, and kiosks.

Learning as a strategic business driver. In an era when many companies have reduced costs to the point where no more can be cut, one of the remaining levers that can drive revenue and minimize costs is organizational learning. Companies who know this and can create learning strategies designed to create business impact can realize this important goal. Companies that know this

view learning as an investment and not a cost.

Learning technologies integrated into enterprise applications. In ideal situations, the learning technologies that employees use are integrated into enterprise applications. For example, imagine if a company using a client relationship management tool was linked to the learning management system, so that after a fixed number of “lost sales,” the LMS would send a list of recommended reading on sales efficacy or sales coaching courses that might provide appropriate job performance improvement recommendations.

Enterprise application integration. When employees consider launching new applications across the enterprise, they are often shocked by the sheer number of applications that either indirectly or directly touches the proposed new application. This is part of the reason why it takes so long to get new applications through the organizational IT rationalization and implementation process. More and more truer application integration will occur, which will reduce data redundancies, provide greater power to applications, and promote re-use of legacy and native applications in the company.

These principles provide the structure for workflow learning. How can one get more immersed in the concepts of workflow learning and related technologies? Spend some time researching key websites. While you searching these websites, you will see key resources and subject matter by experts in the field like Sam Adkins, Jay Cross, and Marc Rosenberg.

Another way to get this information is to search for key principles and concepts of workflow learning, such as virtual collaboration. There are many books and blogs on this topic and related topics.

Implementation

In my role as a consultant and solution design specialist, I am often asked by clients about choosing the “right” technology application for them. Often this question is asked by clients who aren’t exactly sure about what they are going to do with the technology they are

considering, or business and IT requirements. It is impossible to prescribe the best workflow learning applications for people without fully understanding the requestor’s functional and business requirements. Once you have answered those questions and can align the human processes in your organization, you will be able to start your quest toward implementing workflow learning.

But remember, to implement it in your organization, you must be able to answer this question: Do you know the state of your work flow?

To answer this, you must follow three key steps. The first step is to create a workflow map. In this map, you must identify all of the key processes and functions across the organization that you can for the areas you are trying to change. This will provide you the basis for workflow learning interventions you will ultimately implement.

Next, you need to develop an implementation map for potential workflow learning solutions. This will include a description of the desired interventions as well as the timeline to implement them. Then, develop, pilot, revise, and repeat this process for each of the interventions you implement.

The final step involves periodically evaluating the program’s effectiveness of the workflow learning interventions in place and making changes as necessary.

The important thing here is to create some of these solutions that will align with your work flow.

In summary, when you know the state of your organizational work flow, implementing powerful embedded solutions that are parallel with the ongoing activities of employees in the organization can occur. Immerse yourself in your work flow and identify high impact solutions that will mesh with them while providing the requisite learning opportunities to your constituents. In the ideal world, employees will get the learning they need at just the right level, right when they need to know it, with tools and systems they use routinely, with metrics pushed to business leaders instantaneously. When employees are able to improve performance in real-time and not

realize it is happening, the state of workflow learning will be unparalleled.

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