Unpacking
L&D at the
Point of Work

The biggest missed opportunity in L&D today

> **L&D's role at the Point of Work is the biggest opportunity facing the profession**

Foreword

'Learning at the Point of Work' has long been the most effective way for us to develop our knowledge, know-how and insights. By this, I mean doing the work itself; actually figuring things out whilst in unfamiliar situations; leaning on experienced colleagues; and overcoming challenges as they arise. Our reliance on web-search and the wider communities, that ubiquitous connectivity has given us, has heightened this awareness.

We can no longer wait until we attend a programme (that may or may not help us albeit weeks or months after the need surfaces) or commit to elearning that we estimate will offer little value in the context of our work and progress.

In this regard, **L&D's role at the Point of Work is the biggest opportunity facing the profession.** The opportunity to guide and support people to thrive in unfamiliar situations and as they face challenges that their unique organisation and role frames for them. After all, their ability to do so will determine whether they succeed or fail or, perhaps worse, stagnate in their careers.

L&D can no longer provide highly infrequent programmes that address isolated skillsets remiss of the context of their organisation or the specific circumstances of attendees and expect these to give people all they need. In addition, to think that libraries of elearning and 'content' is the answer is an enormous over-simplification.

This ebook unpacks L&D at the Point of Work and lays out what it is — as well as what it isn't — in order to first appreciate its huge benefits to organisations and make it accessible to L&D practitioners wherever they find themselves in their own journey.

I'd like to extend thanks to those I mention in this ebook for their help as well as their vision and expertise in the field of L&D, especially Bob Mosher, Conrad Gottfredson, Gary Wise and Nick Shackleton-Jones.

David James, CLO at Looop
January 2020

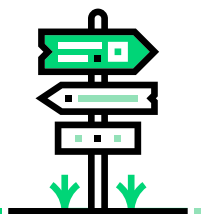# What is L&D at the Point of Work?

New terms have emerged over the last few years that seem to describe similar principles.

Whether it's Workflow Learning, developed by Gottfredson & Mosher, who describe it as 'learning that occurs while I do my job'; or

Josh Bersin's 'Learning In The Flow Of Work', which he describes as 'embedding learning into the platform in which [people] work, so the systems can coach and train [them] to be better on the job'; or

Gary Wise, who has built on the work of Gottfredson & Mosher to develop his Point-Of-Work Strategy that aims to 'equip the right learners with seamless, frictionless, and ubiquitous access to the right learning assets, at the right moment in time, in a work context-centric amount, in a work context-relative format, to and from the right devices'.

Each of these terms has been honed by its originators to convey their ideas or build upon another's. However, what should not be missed is the biggest opportunity available to L&D across each of these terms, that we describe as:

Learning at the Point of Work =

What we all do when we're working, facing unfamiliar situations and challenges and using our resourcefulness, as well as the resources we can gain access to. Whilst it's what we all do, it's not equally accessible and can be hugely inefficient with the same problems being solved hundreds, if not thousands, of times across any given organisation. This leaves new starters feeling ill-equipped and disengaged, new managers feeling overwhelmed and disempowered, as well as anybody going through change feeling out of their depth.

L&D At The Point of Work =

This is the planned and organised version of learning at the Point of Work, where L&D understand the problems that need solving, in the context of the individual and work itself, before creating interventions that efficiently guide and support workers to achieve results by doing more of the right things. Providing the information, know-how and insights when it's anticipated they'll be needed will ensure everybody benefits from the aggregation of experience and expertise that an organisation possesses.

Guiding and supporting workers at the times they need it, in order to perform and get the expected results, and more efficiently and effectively overcome their challenges to thrive in unfamiliar environments and situations. This includes their assimilation into a new organisation, a new or unfamiliar role or down to specific tasks and interactions. Whenever and wherever they are expected to perform, L&D can (and should) be there to help.

It's 'Learning by doing' with expert guidance and support. A useful way to think about it is that when somebody, in any given context, is new to their organisation; new to their role; or facing an unfamiliar situation to them, the problems they are faced with are likely to have been solved hundreds, if not thousands, of times before. It would be helpful to them, and the organisation, if they can benefit from aggregated local experience so they can more efficiently **do more of the right things and more predictably and reliably get the right results.**

Whether its Point of work; Workflow learning; or Learning in the flow of work, each term has its merits, philosophies, approaches and tools. We use the phrase L&D at the Point of Work as a connection between each of them and the recognition that there is a clear and critical role for L&D within it, if we're to have the expected impact today. If we're not there, then we should be questioning our value.

To truly understand L&D at the Point of Work it is essential that we do so from the perspective of the individual and not begin with a topic or an initiative.

For the sake of comparison, let's consider it first from the inaccurate and more traditional perspectives of the topic and initiative. In doing so, we pick a topic and then a delivery mechanism, i.e. Communication skills via elearning or Leadership development via a 3-day residential programme. We then determine content and logistics. Nothing to do with the individual's situation in a way that will make the required difference. i.e. any of their actual points of need.

On the other hand, and the more useful perspective, when we think about what it is an individual is trying to do in the context of their role and, more importantly, what they're not able to do in order to achieve the expected and rewarded performance and results, then we understand the things that are important to them. We begin to understand their point of work and therefore what our role needs to be.

So if a new starter is trying to understand how to get the right things done and not look foolish, we can provide them with the information, know-how and insights that are understood by more experienced colleagues and make them available when and where it makes the most sense to them, in the context of their situation and challenges.

To paraphrase Malcolm Gladwell in his book Talking to Strangers: Don't look at the individual and jump to conclusions. Look at their world.

This approach is harder to 'sell' and so vendors seem to be repositioning their generic solutions as Point of Work but they are simply rebranding existing products to capitalise on the profession's misunderstanding of this emerging discipline. But, as we know, continue to do the same things (albeit rebranded) and you'll get the same results.

"
Don't look at the individual and jump to conclusions. Look at their world.
Malcolm Gladwell Talking to Strangers
"

Why L&D needs to move closer to the Point of Work
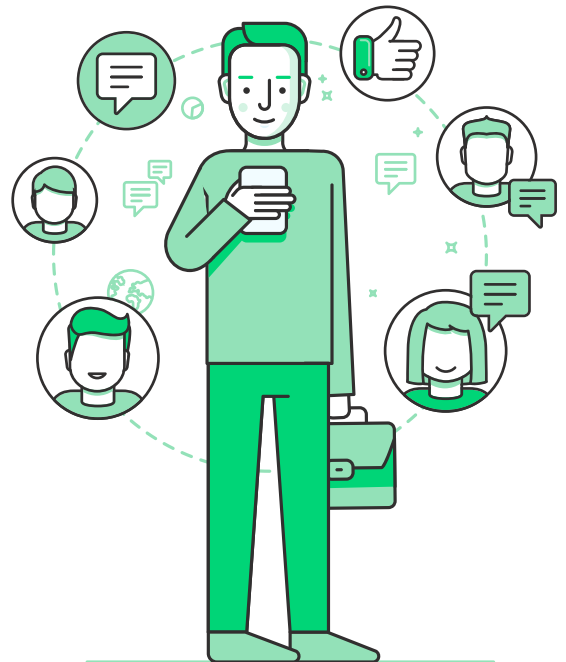
We've known for centuries that the best way to learn is by doing. We tell our children and friends to just 'give it a go'. We give ourselves pep talks to try something different. And yet we educate our stakeholders to value formal learning interventions when it comes to professional development.

Why? Because it's easy for us to 'sell' and for them to 'buy'. We also get a positive reaction to the classroom training so it must work, right? Well, it all depends on what the measures of success are, of course. Did they show up? Yes. Did they like it? Yes. Did it work and make a demonstrable difference? We don't know… And therein lies the problem.

Contrary to the perception that point of work solutions are emerging practices, unproven and unchecked by research, what we are talking about is Experiential Learning (with a sophisticated system of guidance and support), which has been researched as rigorously as behaviorism and cognitivism. To quote Kolb: Learning is a continuous process grounded in experience.

By all means, L&D at the Point of Work is not the only way to learn and so we're not advocating throwing the baby out with the bathwater and only developing Point of Work solutions. But what is being replaced, most often, with point of work solutions is 'fumbling along and inefficiently finding out ways of getting things done — or not'. In other words, solving the same problems that have been solved hundreds, if not thousands, of times inside your organisation.

> **For the things we have to learn before we can do them, we learn by doing them.**
>
> **Aristotle** The Nicomachean Ethics

What L&D at the Point of Work is **not**

Without a single label and, therefore, single definition, learning at the Point of Work has been open to interpretation and misinterpretation.

It's not uncommon for things to have multiple labels and mean almost the same thing. Classroom training, Instructor-led Training (ILT), Training Courses, or Programmes, can mean almost the same thing and it's fine, as long as the practitioner can be understood by their stakeholders and peers.

But where it's not ok is when we rebrand existing practice as emerging practice in order to appear modern or tick a box, without actually changing.

> → **L&D at the Point of Work is guiding and supporting an individual when they need help in the precise context in which they are expected to perform without them leaving the workflow — and certainly not stopping work all together to engage in something semi-related to their work.**

So we're **not** talking about:

- **Classroom Training:** The ultimate in stopping work and removing somebody from the context in which they perform.

- **Elearning:** Just because it's accessible where people work, doesn't make it L&D at the Point of Work. This is 'learning on-demand', which is no more 'L&D at the Point of Work' than Classroom Training. It's much more likely to be generic and topic-centric educational content. Remember, if it doesn't start from the perspective of the individual then it cannot be L&D at the Point of Work and so the biggest opportunity is still being missed.

- **Generic content:** It doesn't matter how many thousands of pieces of content are made available, if it doesn't speak to an individual about what they're doing, in the context of their organisation, team and roles, it's unlikely to help them more than a web-search could, and you don't want to be competing with Google for attention because you've already lost that contest. What Google doesn't cover — and the biggest opportunity available to L&D — is everything cultural and specific to your organisation.

- **Webinars:** Again, content delivered where somebody works is a misnomer.

- **Coaching/Mentoring:** Unless this is initiated by the individual and builds on work currently being done then it's a 'stop work' exercise. The clue is in whether work continues or stops.

But the fact that it's not L&D at the Point of Work does not devalue an interaction or activity. The fact that an apple isn't exercise doesn't make it less valuable.

What 'Learning at the Point of Work' really looks like

Before we explore L&D's role at the Point of Work, let's look at 'Learning at the Point of Work' — what people already do to 'learn' and, more importantly to them, perform at their point of work...

Being shown by somebody

'Sitting with Nellie' was a phrase used to describe a novice worker sitting with an experienced team member to 'learn the ropes' of a new job.

Eventually the novice would take on more and more tasks before the roles were reversed and Nellie was simply observing and answering questions, while the novice performed the role. In this regard, every interaction was learning at the Point of Work. Additional resources (examples of which are listed below) could be used to support the experience of learning while working. Today, work is more complex and roles can be more fluid than to be easily relayed from one worker to another, so being shown entire roles is less common. Instead, 'buddying' is more common but has it's limitations.
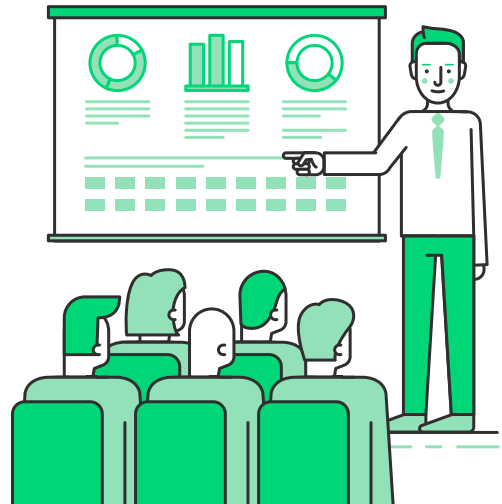
Asking somebody

Rather than being shown, this more reactive way of Learning at the Point of Work may mean swinging a chair around; giving somebody a call; or an instant message exchange.

If you have access to somebody with experience and/or expertise then a quick conversation or 'how-to' can be incorporated directly at the Point of Work. This may be seen as interrupting the flow of work but it can interrupt work no more than a thought would, especially in Knowledge Work. Conversations build on and add to the process of working with information, know-how and insights. After all, two heads are better than one.

Cheat Sheets, Process Flows, Checklists, etc.

As mentioned above, resources such as these can be used like breadcrumbs to show the way for those who may be unsure or lost.

When completing a task or interaction that has predictable paths, these resources can guide and support people to achieve more predictably reliable outcomes. These may be committed to memory over time but remembering is secondary to successful accomplishment.

The power of these should not be underestimated. Checklists, for example, have been used to:

- Eliminate cases of infection within hospital Intensive Care Units;

- Contribute, in no small way, to the US annual "building failures" in construction to be less than 0.00002%; **and**

- Contrary to many arguments against Point of Work solutions, pilots use dozens of checklists to guide them through their normal, as well as many 'non-normal', tasks prior to and during flight. http://atulgawande.com/book/the-checklist-manifesto/

Web Search

Again, Knowledge Work relies so much on the gathering and utility of relevant information and insights, interpreting these for the benefit of organisations, stakeholders and customers.

In this regard, instant access to the world's information has become an essential crutch. Whether it be to trusted sites or a Hail Mary into the search bar, workers rely on their ability to connect with information and expertise in the form of research, articles, blogs, images and videos. However, without the context of any of the important parties (searcher, their organisation or stakeholders) search results still require a great deal of interpretation.

YouTube

Although there are various video sharing sites, YouTube is an example of where individuals may search for know-how, rather than information, equipping them with the ability to solve problems that only trained and skilled professionals could have done before.
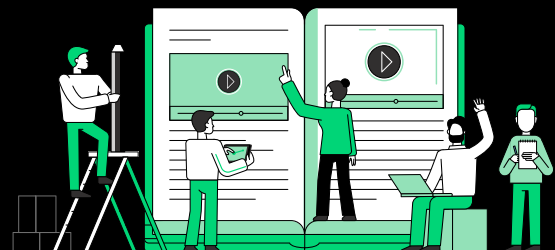
From trades to software, anybody can gain the know-how they need to more confidently and competently achieve more. Cara Brookins is an example of this having built a 3,500-square-foot, five-bedroom house using YouTube tutorials.

What's L&D's role in Learning at the Point of Work?

With Learning at the Point of Work already happening in organisations, can L&D just stick to running programmes and providing elearning?

In short, 'no'.

What is happening already is a clue to the power of — and appetite for — Learning At Point Of Work solutions. But it's not enough.

There is so much opportunity for L&D to employ Point Of Work solutions that don't just provide 'learning experiences' but that truly affect performance, productivity and organisational capability — far beyond the limitations of programmes and elearning.
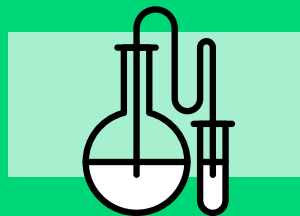
A simple 3-step process can help L&D to begin.

1. Understand the real problems people are facing as they transition into and through your organisation, as things change; or as their circumstances change around them.

2. Experiment with those you wish to influence to address the actual friction they have (or will) experience.

3. Scale what works with automation.

When you understand what really needs addressing and what people need when they need it, the easy part is pulling together aggregated local know-how and insights, in the form of resources, that will positively affect performance and results. These may be:

- A short description of what people in their situation generally do at their specific organisation in order to outline the expected and rewarded behaviours, i.e. What's expected in a presentation to senior-level executives;

- A screen-recording that shows organisational or team specific systems, processes and interactions, i.e. How to submit a budget forecast using internal systems;

- A checklist of steps to follow, i.e. The critical steps to follow to maintain staff safety;

- A talking-heads video montage of people who have successfully navigated tricky situations facing those you wish to influence, i.e. How they've successfully managed somebody in their team who didn't like them.

Each of these is short and specific enough to keep the person in the flow of work and uses local know-how to guide them to doing more of the things that are culturally acceptable whilst developing skills at a context-specific level, when the alternative is to muddle through until a place comes up on a course, assuming those situations and skills are addressed on a programme.

And remember, it's not about throwing the baby out with the bathwater and scrapping all training and elearning, It's about recognising real problems that need addressing because they are critical. Which is always where we start.

For a more complete exploration of how to do this, see the Looop L&D Disruption Playbook →

Developing L&D at the Point of Work solutions

Imagine you're a new starter in your organisation. Rather than induction being a short face-to-face meeting followed by compliance modules and muddling through, new starters are guided and supported from before their first day right through to passing their probation, with much greater efficiency to more reliably help them perform and achieve. **What could this look like?**

Well, to understand this, we need to go back to a point made earlier, we need to understand it from the individual's perspective, not from a topic- or L&D-perspective.

This is an example of a new starter campaign which first seeks to understand the context of the individuals before applying a solution, in this case the resources.

2 weeks before day 1

Context: Prior to starting a new job, new starters may be anxious and want to know more about what they're getting into.

Resources:

→ Why it's an exciting time to join the organisation // What to expect on day 1 and beyond // What to wear on day 1

Morning of day 1

Context: Our new starter is excited, nervous, and consciously incompetent walking into their new organisation and role. They may just need to know everything will be ok, they'll be supported the whole way - rather than overwhelmed.

Resources:

→ How to get yourself set up // Keeping yourself, colleagues and the company safe // Get to know the offices // Understanding the 'lingo'

Morning of day 2

Context: They are still excited and reality is also hitting them. What is expected of them during this initial period?

Resources:

→ Overview of the company // What customers and clients expect of us // How we like to communicate with each other // How we interact with our customers and clients

Morning of day 5

Context: It's the end of their first week. How might they be feeling?

Resources:

→ The Insiders View: Learning from recent new starters // The Insiders View: Getting yourself known here

Morning of day 4

Context: They are starting to gain some familiarity but hands-on support may be lessening.

Resources:

→ Unpacking our culture: How we do things around here // How to get yourself known here // How to keep up with what's going on here

Morning of day 3

Context: Lots of new information has been coming their way with new people and systems to get used to. Overwhelm is really kicking in.

Resources:

→ People you should know about // How the different departments work together

Afternoon of day 5

Context: End of the first week check-in.

Survey pulse check:

→ How's your first week been?

→ What else do you need?

Morning of the beginning of week 2

Context: Right! Our new starter is determined to consolidate last week's experience and start to demonstrate their value.

Resources:

→ Understanding what's expected of you

Afternoon of midweek 2

Context: Our new starter might be wondering how they're doing.

Survey pulse check:

→ How are you doing?

→ What else do you need?

→ Morning of last day of week 2

Context: The big things may be coming together for our new starter but there are still some details and nuances that are a little unclear.

Resources:

→ How to request holiday // How to process expenses

Beginning of week 3

Context: As their familiarity increases, our new starter may be setting themselves mini goals and challenges for their development. What might they want to get to grips with this week?

Resources:

- Checklist of things you should know by now (this checklist would be context / org. specific and maybe built after the campaign has been live for a few weeks?)

Morning of end of week 3

Context: How is our new starter feeling about their progress and the organisation now?

Survey pulse check:

- How are you doing?
- What else do you need?

End of month 2

Context: It's been a month since we last checked in, so let's see if our new starter is on track?

Survey pulse check:

- How are you doing?
- What else do you need?

30 days after joining

Context: It's a good time to reflect and plan as well as tell us what else would be helpful.

Survey pulse check:

- How are you doing?
- What do you need to prioritise getting to grips with?

Morning of the beginning of week 4

Context: Our new starter may now be ready to build on their experience with some deeper level understanding?

Resources:

→ How to gain support for your ideas here // Getting the most out of 1-1s with your manager

Mid-month 3

Context: Our new starter is approaching the end of their probation period and despite positive signals this can still be an anxious time, so they may appreciate some guidance.
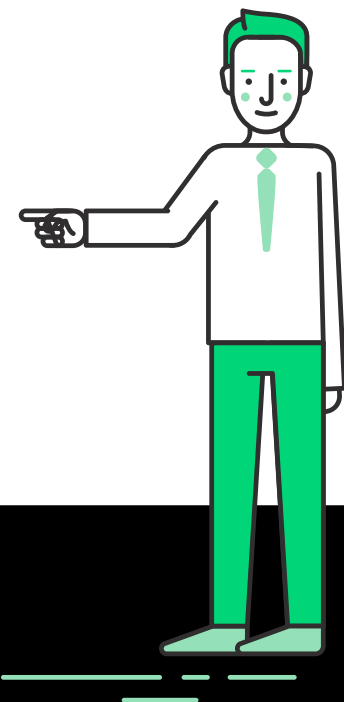
Resources:

- Are you ready for your probation review?

End of month 3

Context: Having passed their probation, it's a good time to set some longer-term goals and plan their development.

Resources:

→ How to set objectives for the rest of the year // Opportunities to develop and progress here

The experience must be designed from a user-centric perspective and focused on what people are trying to do and achieve, in anticipation of their needs. It's integrated with the tools they use for work. It's focused on what's important to them in the context they are experiencing their work and challenges.
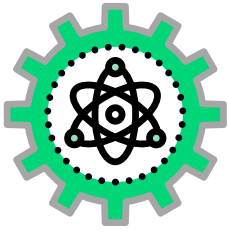
Different roles bring complexity to solutions

Imagine being alerted to situations as they occur and guided to do what has already worked for your colleagues, bringing not just information but know-how and insights in the context of the different roles you may have in your organisation.

So being a new manager, in Sales with budget-holder responsibilities, you could be:

- Informed of the role of manager in Sales at your organisation, prior to starting;

- Provided with a company overview, from a Sales function perspective, to navigate the organisation to start understanding how things work, on day one;

- Shown which communication channels to use (and when) as an introduction to communicating and influencing at your new organisation, on day two;

- Prompted to spend time on building individual and team relationships alongside insights from more experienced managers, over the first 2 months;

- Guided to complete budgetary responsibilities prior to deadlines but only as required;

- Prompted to schedule time for 1:1s with your team and given tips and tools to make the most of them.

There would be so many other resources that speak specifically to an individual, who has various roles, and an automated way to surface resources (or groups of resources) in anticipation of a need or requirement.

Add into this a way of increasing user-centricity by having individuals self-assess their confidence and competence in relation to their assimilation, compliance and growth, along with an opportunity to share what else they need and when.

This will go a long way to addressing the pressing concerns of individuals and critical points of failure in any organisation.
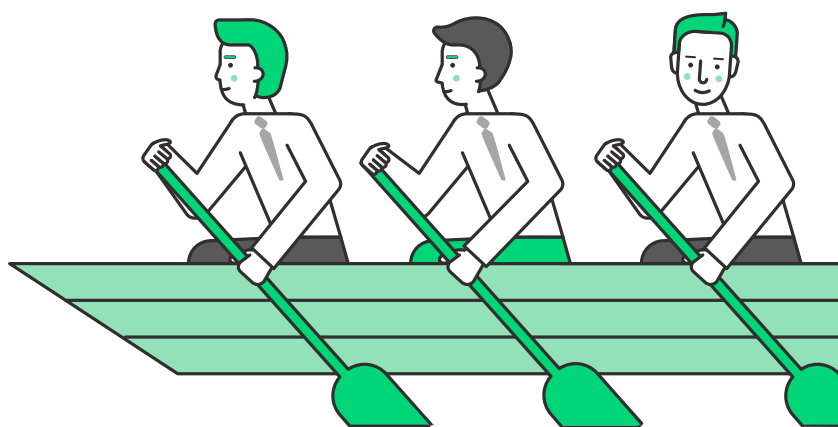
Measuring the effectiveness of L&D at the Point of Work
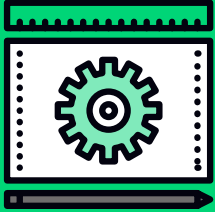
The key to effective measurement is whether any intervention is addressing a real problem and whether there is data that shows that it is a real problem. If this work is done at the outset then the data you collect will be your ground-zero and progress can be mapped until the desired outcome is achieved.

A modern dashboard to organise and summarise analytics can show to what extent automated campaigns are being engaged with; to what extent they are close enough to the point of work; and show what progress is being made towards the end goal, in a format that is easy to read and share.

Any conversations around ROI should be had prior to intervention design, as it is discussed what the

cost of inaction could be against the analysis and experimentation required to address it with a point of work approach.

In short, if it's not a real problem, people will not engage. Use data and evidence to understand critical points of failure and the friction that people are experiencing in the context of their work before doing anything else.

It's time for L&D to lead with solutions that add value

L&D at the Point of Work may be recognised by different terms and with slightly different approaches but the opportunity each of these provide is broadly the same: Get close enough to the point of work to address actual points of friction and L&D can make a demonstrable difference to performance, productivity and organisational capability.

It's now time for the profession to embrace L&D at the Point of Work and lead with solutions that add continuous value because they are grounded in data, evidence and experimentation so that what is scaled is known to work.

Our stakeholders need less convincing than our profession on this and so it's time for us to extend our expectations of our own value, to develop a new vision for L&D based on addressing what's important to our organisations and people, and to grow our own skills and capabilities to do so.
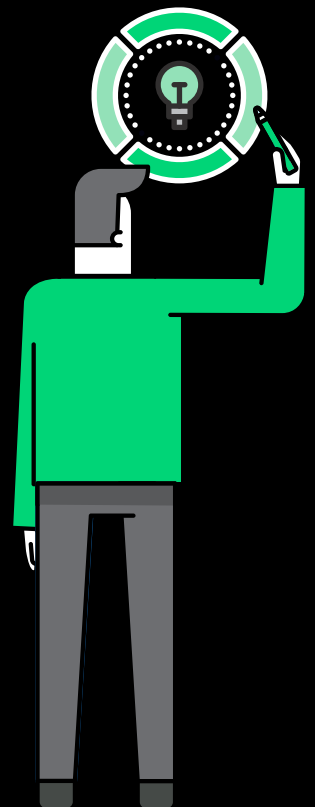
The point of work is the real point of learning so let's get there and make a real difference.

Interested to see how Point of Work solutions will impact performance and generate results in your organisation?

Contact Looop today →
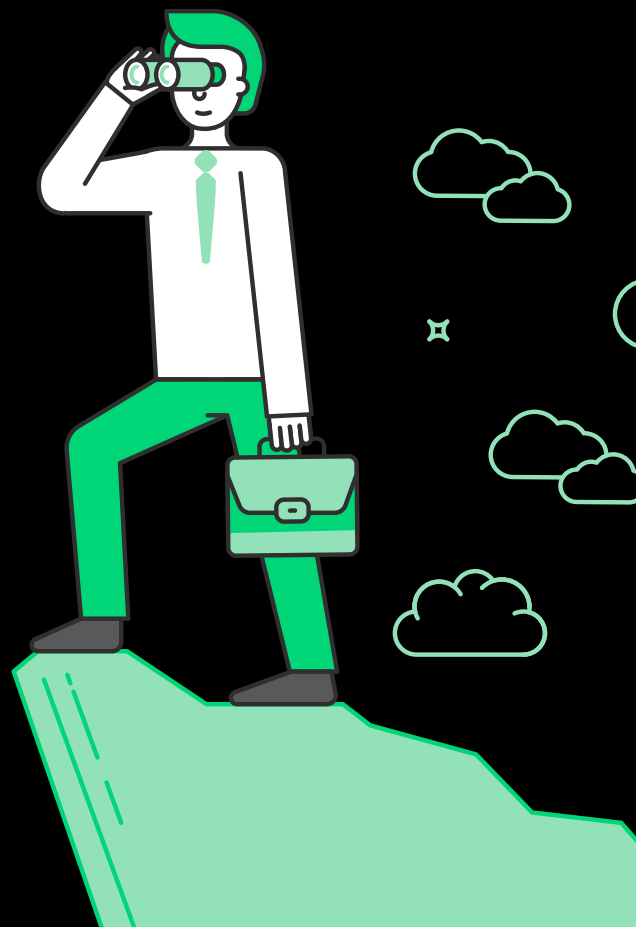
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