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White Paper

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Phased Blended Solutions: A Performance-Based Approach

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Abstract: This paper describes the approach that effectPerformance designers use when developing blended learning programs and curricula and strategies you can use to determine when to choose a blended solution. Our Phased Blended Solutions approach involves integrating non-training, formal training, and informal training solutions to address the learner's changing needs over time. The emphasis of this approach is on supporting the learner through the learning progression which generally progresses from knowledge and skill acquisition to transfer, to skill mastery, and eventually to fluency. Without support, many learners fail to transfer acquired skills to the workplace, which has dire consequences for the learner and organization. With complex, mission-critical skills, a phased blended solution provides the needed support, thereby contributing to improved individual and organizational performance.

Introduction

In a recent white paper, Marker and Pretera (2006) reviewed the blended learning literature and described five common approaches to designing blended learning solutions: *Stitching*, *Styles*, *Bookend*, *Integrated*, and *Performance*. In this paper, we describe our own blended learning approach, the *Phased Blended Solutions* model. This *Phased* approach is a product of our team's collective experience and our reflection on the best practices of our fellow practitioners. In addition, the approach is rooted in performance-based instructional design principles, which are supported by over 60 years of educational research. The paper begins by framing learning as a progression—as a collection of activities and events over time—rather than as a single magical event. When we understand learning in this light, then the stage is set for viewing blended learning as a phased solution that addresses a learner's changing needs over time. We then conclude this paper by suggesting a decision matrix that training managers can use to decide when a *phased* approach is worth pursuing.

Learning as a Progression

At effectPerformance, we believe that workplace learning can best be described as a progression (see Figure 1), as a series of events rather than a single moment in time, and therefore solutions need to be designed with this progression in mind. For example, when striving for skill transfer (i.e., when the worker applies what she has learned to her job), there are performance needs to consider. What instructional design strategies best support skill transfer? Role plays, hands-on practice, simulations, and war gaming are strategies that can support transfer by encouraging the worker to apply what they know to situations that mirror the real-life conditions of the workplace. Coaching and job aids can also assist workers as they struggle with transfer. Another consideration is that the worker must build her knowledge and skills and eventually master them before she has any skills to transfer in the first place. Therefore, it may not be sufficient to use only a simulation strategy: often a blend of solutions is needed to support a given progression.

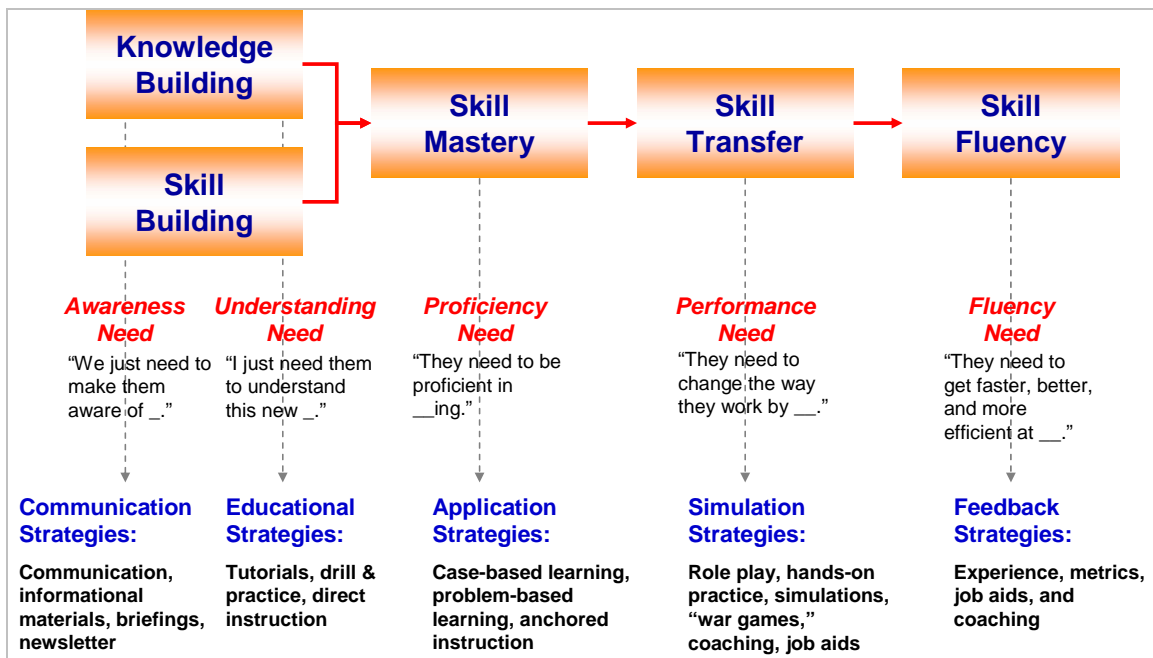


Figure 1. *Learning as a Progression*

Example of a Learning Progression

For us, the issue of learning as a progression holds particular weight in guiding curriculum-level and program-level design decisions. Consider the following example, which depicts a typical learning progression.

Let's say that a salesperson, Sheila, concludes that she'll attract a larger pool of potential clients if she learns how to create an effective webinar. To achieve her learning goal, she seeks out resources to learn the basics of webinars. Perhaps Sheila finds a colleague from a different department, Jim, who is experienced in this area. Sheila asks Jim for some pointers, and he says he'd be glad to help and "don't worry, it's easy." Jim gives Sheila a quick run down of how to plan a webinar, how to work the software, and how to run the session effectively. Sheila reads a few books and online articles about delivering effective webinars. She has a vendor demonstrate a web conferencing tool for her. During this time, Sheila is engaging in what we could call knowledge acquisition.

At some point, Sheila realizes that if she is going to learn how to design and deliver a webinar, she is going to need to do it, not just read about it or watch it being done. So, she decides to design a short webinar about a topic that is familiar to her now, "Webinar Best Practices." She delivers that webinar to colleagues within her department and gets their feedback afterwards. Though Sheila continues to acquire knowledge, her learning experience has graduated from mere knowledge acquisition to skill acquisition. By engaging in the tasks of designing and delivering a webinar, even a simple one to her colleagues, Sheila is beginning to realize what it really takes to perform this task effectively. She incorporates her lessons learned and the feedback from her colleagues

and mentally rehearses how she would do things differently next time. She is developing skill proficiency.

Sheila could continue to practice with her colleagues and improve her proficiency, but eventually she will need to transfer her skills and knowledge to a real-life work setting. She realizes that there is a big difference between delivering a webinar to her colleagues and delivering a webinar to prospective clients. It's at this point that many workers do not bother going through the trials and tribulations of transfer; rather, they avoid transfer activities and instead return to their normal patterns. In other words, other salespeople would find some excuses for never delivering the webinar to their prospects. But Sheila presses on with her odyssey. She designs and delivers a webinar for her sales prospects. Her first session is less than stellar. Three prospects drop out of the session early and the feedback from those who stay is less than encouraging. Sheila is upset and considers abandoning the webinar idea. After a few days, Sheila picks herself back up and decides to try again. She knows she can get this right.

If Sheila sticks with it, she will eventually develop skill mastery. That is, she will be able to perform the tasks effectively to a reasonable degree on a regular basis. Once Sheila achieves skill mastery, her learning reaches a high water mark. She may learn a few new things from time to time, prompting subtle changes in how she performs, but the steep side of the learning curve is behind her.

With much repetition and feedback over time, Sheila will progress from skill mastery to skill fluency. Designing and delivering webinars will become second-nature to her. She will anticipate questions and quickly adapt to changing conditions within her sessions. People will say she makes it look so easy. She will become the webinar expert

within her department. Sheila will have by then forgotten how difficult it was in the beginning. And when a new hire comes to her and asks her for tips on conducting webinars, she will start by saying, “don’t worry, it’s easy.”

If you were an instructional designer charged with supporting Sheila’s learning progression, what instructional experiences and resources would you provide her? When you look at learning as a progression, suddenly the scope of the instructional designer’s work expands considerably. A novice designer might view the scope of his or her responsibilities as beginning and ending with knowledge and/or skill acquisition. However, where Sheila needed help the most was in transferring her skills so that she could reach skill mastery and eventually skill fluency. Without transfer, learning is merely an academic exercise. It has little impact on performance, and therefore, has little impact on the worker’s or the organization’s success. Therefore, to the extent that instructional designers exist to support the growth performance improvement within an organization, they should consider ways to promote skill transfer, skill mastery, and skill fluency over time. A phased approach to blended learning provides a means to this end.

Blended Learning as a Phased Approach

By weaving together a series of learning experiences over time, the instructional designer can support the worker’s journey through the entire learning curve, not just fragments of it. Drew Morton, IBM Director of Management Development, writes: “IBM Learning believes that management development is a transformational and extended process, rather than a classroom event” (Morton, 2004: p. 1). At effectPerformance, we share this vision and apply it in the way we design our blended

learning solutions. Consider the following example, a blended curriculum we designed for a financial services firm's new hire stockbrokers.

Example of a Phased Blended Solution

As part of the new curriculum, new hires complete a series of online courses designed to help them acquire knowledge and skills related to consultative selling, financial analysis, and financial products. These trainees attend web conferences and face-to-face instructor-led training sessions for collaborative learning experiences, which further their skill development. At the end of their initial training period, trainees attend a capstone course in which comprehensive case studies and role play activities are used to help trainees apply what they have learned to real-world scenarios.

Trainees then go into "production," meaning they can begin calling on real clients. To support them during this transfer period, a coaching program has been put in place. Trainees meet weekly with their sales managers and work through a structured agenda. The sales managers received training on how to conduct these coaching sessions, but also attend regular coaching calls with sales trainers and sales managers from across the country to discuss best practices. In addition to the coaching, trainees are given a variety of job aids, tools, and reference materials, as well as phone numbers to support desks.

At the end of their first year, those trainees meeting pre-defined sales quotas are said to have achieved skill proficiency. They attend additional training meant to fine-tune their skills and to help them transition to a more sophisticated business model. Trainees—and they are still thought of as trainees until the end of their second year—are required to acquire certain professional certifications to demonstrate their skill mastery.

Fluency comes with time and repeated interactions with clients and is marked by unusually high sales performance. Fluency is rewarded through recognition, incentives, promotions, and additional development opportunities... usually, in tropical locations.

Figure 2 depicts this phased blended solution in the context of the learning progression. The example demonstrates how training and development can support workers through the entire learning progression by blending a variety of strategies. This phased blended solution included courseware, web-based and face-to-face instructor-led training, face-to-face and phone-based coaching, and job aids. These various components came together to address an overarching performance goal... to develop high-performing stockbrokers. Not all blended solutions need to be this sophisticated. In fact, for many low-complexity skill needs, there are far simpler blends that can be used to accomplish the learning objectives, such as the *Stitching*, *Styles*, and *Bookend* approaches (see Marker & Prester, 2006 for details).

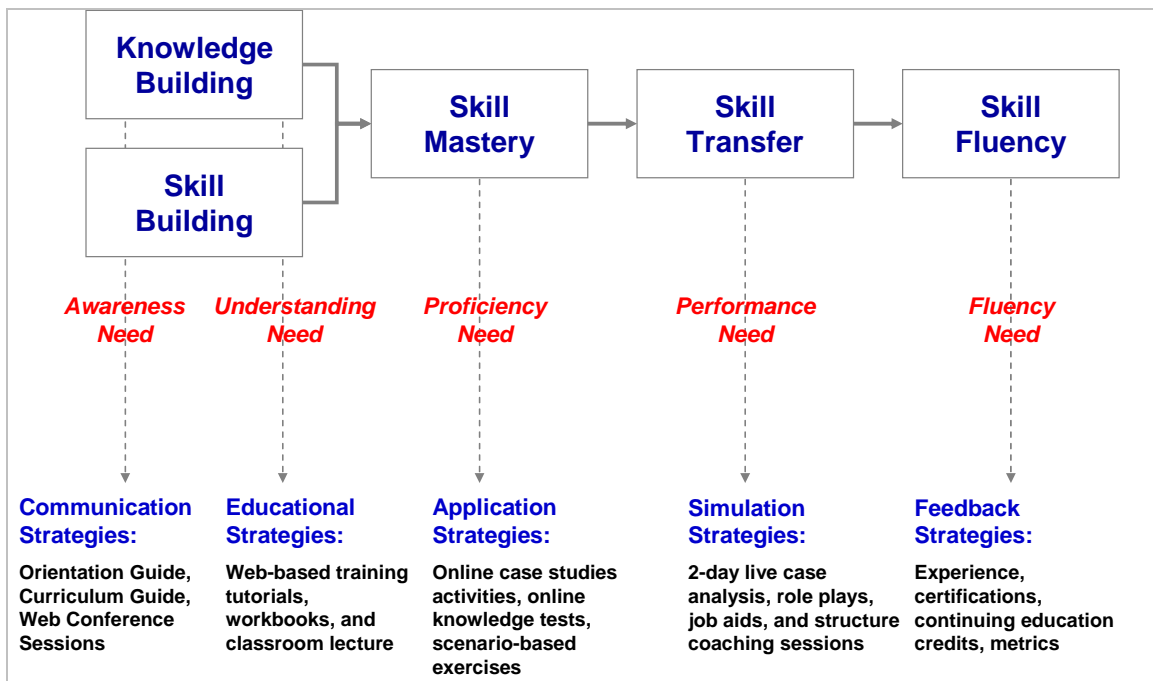


Figure 2. Example of a Phased Blended Solution

Blending Through a Performance Improvement Lens

We view blended learning through the lens of performance improvement. The scope of our design efforts is not limited to the learner achieving knowledge or skill acquisition and eventually reaching some minimum level of skill proficiency.

Knowledge and skill acquisition do not in and of themselves equate to improved individual or organizational performance. It is only by remaining focused on skill transfer, mastery, and fluency that we, as instructional designers, can significantly influence workplace performance.

This broader focus, in turn, causes us to seek out powerful combinations of solutions that economically and effectively enable us to support learning over time. Having learners read a book and then complete a web-based training program that simply reinforces key concepts is okay, but the incremental benefit is minimal. On the other hand, when you combine a knowledge acquisition activity, such as reading a book, with a skill acquisition activity, such as performing in a role play activity, and then you combine those with transfer activities, such as coaching or peer mentoring, and then with a mastery activity, such as a skill certification program, then you are beginning to unleash the true power of blended learning. You are beginning to see blended learning as an extension of your performance improvement efforts.

Commonly Used Training Approaches

Table 1 describes some commonly used approaches that can be combined to form a phased blended solution. As Rossett, Douglass, & Frazee (2003) suggest, blends can include both formal and informal training components and, as Valiathan (2002) suggests, blends can also include non-training components as well. If the goal is to influence

performance outcomes, then any method or methods that will elegantly and cost-effectively do the job are open for consideration.

Table 1. Common approaches that can be blended to address performance goals

	Requires Facilitation	Requires No Facilitation
Non-Training	<ul style="list-style-type: none"> • Clarify Expectations – Managers should communicate with their workers about their expectations and about their workers' willingness and ability to meet those expectations • Change Incentives – When incentives reward undesired performance or punish desired performance, change the incentives • Ergonomics – Involves assessing and optimizing the physical environment's effects on workplace productivity • Job Redesign – Involves documenting, evaluating, and optimizing workflow within an organization 	<ul style="list-style-type: none"> • Job Aids – Act as quick reference materials that remind workers of important factual information, such as a key set of procedures • Performance Support Tools – Tool that workers use to perform a task and containing resources that help workers make better decisions or perform more effectively. Can be as simple as a document template or as complex as a telemarketing tool that provides a customized script for each prospect • Adequate Resources – Managers need to assess continually whether or not their workers have adequate resources and, if not, provide them
Informal Training	<ul style="list-style-type: none"> • Coaching – Structuring interactions between a supervisor and a subordinate around specific competencies can promote understanding of expectations and can generate feedback opportunities, which make for good on-the-job training • Mentoring – Pairing individuals with more experienced peers and promoting knowledge transfer can be effective if mentors are willing and able to invest the time • Developmental Assignments – Creating a set of best practices, standard operating procedures, benchmarks, or metrics can develop the workers' abilities to think more strategically about their work 	<ul style="list-style-type: none"> • Job Rotation – Temporarily moving workers into different positions within an organization provides cross-training opportunities and develops their ability to think strategically and collaboratively about the organization and the work involved • Exchange Programs – Temporarily moving workers into the same position at a different geographic location provides opportunities for workers to develop broader perspectives and more collaborative work practices • Knowledge Sharing – Asking workers to share their knowledge and experiences, through online discussion, white papers, conferences, brown bag sessions, book reviews, newsletters, posters, and other outlets, can promote learning across the organization
Formal Training	<ul style="list-style-type: none"> • Classroom Instruction – Lecture, role play activities, and workshops conducted face-to-face in a classroom setting • Virtual Classroom – Training that is facilitated online through web conferencing, threaded discussion, chat, email, or other web-based collaboration technology • Phone-based Instruction – Conduct role plays one-on-one over the phone or deliver a lecture via audio conferencing 	<ul style="list-style-type: none"> • E-Learning Courseware – Self-paced web-based or computer-based tutorials and simulations • Workbooks – Self-paced paper-based or electronic workbooks that guide the learner through information, exercises, and resources • Online Testing – Tests delivered through an online test engine, which can be used to reinforce learning and to hold learner accountable for completing unsupervised training assignments, such as reading a book

To Blend or Not to Blend

A phased blended learning solution—because it involves integration of multiple delivery formats and multiple components over time—can be expensive, time-consuming, and difficult to manage. This suggests that it is not an approach to be used all the time to address every learning need that arises. When is it worthwhile to pursue a phased blended approach?

Our two primary criteria are *skill complexity* and *skill importance*, as they relate to a particular job. Consider the decision matrix in Table 2. If a skill is not very important to a particular job, then divest your training resources from that skill, whether the skill is complex or not. If you are compelled politically to act, then leverage job aids, communications, and other low-end solutions to accomplish the goal. If a skill is important to a job, then invest your resources there. If the skill is mission-critical to the job and also highly complex, then concentrate your training and development resources there.

Table 2. Decision matrix for investing training resources

Skill Importance	Skill Complexity	
	Low	High
Low	Divest – Avoid the temptation to invest resources here. If you feel compelled to do anything, leverage job aid, communication tool, or other low-cost solution.	Divest or Defer – Consider ways to remove the need for this skill altogether (for this job). If not possible to divest, make this a low priority training project.
High	Invest – For low hanging fruit, consider a simple blend that includes practice with feedback and on-the-job support. Focus on skill transfer.	Invest – Consider a phased blended solution that addresses the <i>entire</i> learning progression. This is where your resources can have the most impact.

The high importance, high complexity cell is where a phased blended solution can have its greatest impact on individuals and on the organization. This decision matrix may seem obvious, yet we commonly find training departments expending resources on developing skills that are neither important nor complex enough to warrant the expenditure... *training for training's sake*.

Consider the stockbroker example just examined. Is the financial services firm justified in using a phased blended learning approach to develop its stockbroker's ability to prospect for clients, analyze financial needs, and recommend products? Those skills are mission-critical for the stockbroker and the combination of skills is highly complex. Would a blended learning approach be justified if instructional designers were teaching the stockbrokers supervisory skills? Since most stockbrokers do not supervise anyone, one could easily dismiss this skill as being low in importance for stockbrokers. If a skill is mission-critical to a job, however, (as surgical skills are to a surgeon, as writing briefs is to an attorney, as dough spinning is to a pizza maker) and if that skill is made up of a variety of subordinate knowledge and skills (writing a brief requires knowledge of law and legal precedents, ability to construct arguments, etc.), then that skill is a very good candidate for a phased blended solution.

Conclusion

This paper describes the way effectPerformance views blended learning and makes use of its Phased Blended Solutions model to approach curriculum design. We have used this approach successfully to help clients achieve organizational learning and performance goals. Phased blended solutions support learners through the different phases of the learning progression as they develop complex, mission-critical job skills.

When left unsupported, learners often fail to transfer skills. Immediate results are that proficiency wanes; skill and knowledge erode; and the organization squanders precious training resources on learning events that fail to produce performance results. With complex, mission-critical skills, this waste can have dire consequences to individuals and to organizations in an ever-more-competitive and ever-more-global marketplace.

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