

Future Proofing

How Adaptive Learning
Organizations Improvise
and Innovate in the Face
of Rapid Change

alleninteractions
EXPERIENCE. THE DIFFERENCE.

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EXPERIENCE. THE DIFFERENCE.



We get it.

Learning is survival.
Learning is achievement.
Learning is success.
No one survives, achieves,
and succeeds without
learning, adapting, and
performing.

All that sounds onerous,
but learning can and
should be fun. In fact,
almost every game we
play, we play for fun
knowing that to win we
will need not only to
apply the knowledge
and skills we currently
have but also to keep
improving to stay
competitive.

Digital technology allows
us to fail in private so we
can succeed in public.
Appropriately designed
learning experiences
adapt to our current
levels of ability and move
us forward toward higher
levels of competency.

Sound like a game-
playing experience?
Indeed. Learning is fun
when designed well.

If a training organization
pushes its people through
learning programs that
are boring and ineffective,
no one gets that wasted
time back. Not the
individual. Not the
organization. Ineffective
programs, no matter
how cheaply they may
have been developed, are
extraordinarily wasteful
and expensive.

We get it. For hundreds
of corporations over
decades, we've produced
successful, meaningful,
memorable, motivational
learning experiences. It's
who we are. It's what we
do. Let's make yours both
fun and effective.

Michael D. Allen

Company founded in

Year

1993

Company staff &
remote workers

Team Members

200+

Projects done since
company founding

Projects

20,000+



Our vision

Success comes from doing the right
thing at the right time. By creating
fascinating digital experiences, we
strive to help everyone realize their
full success potential.

Our mission

“To enhance the human mind and spirit
through meaningful, memorable, and
motivational learning experiences.”

future proofing

ready or not

emergent strategies

There will be disruptions on the path to your organization’s goals. Count on it. If there aren’t alien attacks, there will be other disruptions. Some will be survival-threatening disruptions. Consider, for example, digital networking. Our networked planet means many organizations must now compete globally. Technology-nimble companies (e.g. Uber, AirBNB) are out-competing their traditional rivals, who are finding it difficult to catch up.

The average lifespan of S&P 500 Companies is falling from 33 years in 1985 to 20 years in 1990. It is expected to be down to a mere 14 years by 2026. If organizations want to survive, much less thrive, they cannot conduct business as usual.

Some changes you will see coming. Some you won’t. But they will come. Will

you be ready? Can you be ready? Can you get ahead of them?

Head-in-the-Sand Strategies

Change brings challenge. It’s tempting to kick adaptation down the road, ignoring shifts in markets, workplaces, competition, and technology. Ignoring the change doesn’t make their challenges go away. It only makes you increasingly defenseless. It makes sense to act early, even introducing innovations yourself. But how do you respond to change effectively and with the speed needed? And who leads the charge?

Becoming Adaptive

The whole of the organization, not just the leadership, needs to think differently, act differently. In responding to change, people have to alter what

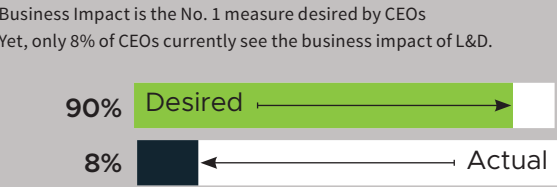
Alarming Market Data

90% of business leaders believe that Learning and Development (L&D) programs are the key to closing skill gaps. But only 8% of CEOs say they actually see the business impact of their L&D expenditures. Fewer than 4% of CEOs see a clear return on investment (ROI). **LinkedIn Learning 2017 Workplace Report**

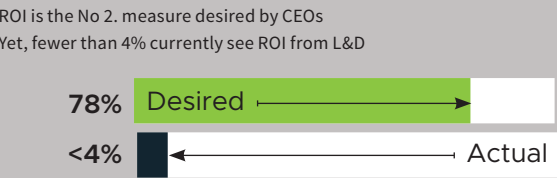
The Center for Management & Organization Effectiveness (CMOE) also has its own Top 10 list of challenges facing L&D. It identified the number one challenge as “dealing with change.” Given the external impact of emerging technologies, the necessary and inevitable internal changes in any organization will only continue to exacerbate this challenge.

A recent survey, from HR.com on the

Business Impact



Return on Investment



effectiveness of learning solutions, discovered that only 16.5% of people strongly agree that L&D in their organization is excellent. With confidence in L&D so low, it can be especially hard for learning leaders to facilitate change.

Perception of L&D Excellence



they do and when they do it, giving up the comfort of “how we’ve always done it.” Lean methods in manufacturing and agile software development are examples of new approaches that challenge command and control models by distributing decision making and encouraging collaboration. It can’t be a one-time fix. It has to be a continual process of upgrading processes and skills.

might be even now. Viability of skillsets will fade with increasing rapidity as external changes accelerate. So you’ll either need to be in a rat race of firing employees and hiring replacements (good luck finding people already fully trained in exactly what you need), or you need an awesome L&D program to give employees the training and continuing practice they need to deliver top notch performance.

Our people must be ready and able to do the right things at the right times, even though what is “right” is constantly evolving. An adaptive organization is flexible and agile, senses deeply, and responds quickly to change. It espouses both agile and lean thinking and seeks opportunities for advancement through experimentation without fear of failure.

And just to up the ante: It’s not a winning strategy to lag behind, upgrading skills after they’ve become inadequate. Success comes from upgrading before you’re suffering the pains of failure.

Traditional Training Is Inadequate

It’s obvious that however talented employees are today, their skillset will be inadequate in the future. They

with traditional training. Adaptive organizations recognize that learning is everywhere, all the time, personalized, and not stuck in a classroom. They use supercharged, the maximally



While organizations struggle to adapt to the pace of change, L&D faces its own challenges. These include the reactive, rather than the proactive, use of training; the difficulty in getting management buy-in for new learning initiatives; the business of

not making time for training; and the complexity of implementing new learning technologies. There is also the challenge of aligning training outcomes to measures of effectiveness and engagement. Above are recent results from a crowd-sourced kiosk at ATD ICE in May 2019.

effective, challenge-based interactive learning experiences of retrospectives, reflection, experimentation, and purposeful practice.

that. Everyone intuitively recognizes good training along with up to date tools and constructive collaboration could and would make a big improvement. But nothing improves.

Ready or Not

The problem is, an amazing number of organizations are not ready. Their training programs are boring and ineffective. Upper level management suspects that. The L&D team knows

It’s time to get ready. Here’s how...

five indispensable models

for adaptive learning organizations

principles of an adaptive learning organization

An adaptive learning organization approaches learning holistically, developing the capacity to sense, respond, and adapt continuously. It does this by fostering high functioning individuals and teams that serve as the central nervous system for their businesses. The collective intelligence of an adaptive learning organization can sense changes to internal and external conditions, respond with targeted capacity development, and iterate internal learning processes.

We have identified ten principles of an adaptive learning organization that you can use as a tool to help your L&D teams drive value for your business. These principles should serve as a guide for understanding where you might be in your evolution as a learning enterprise. Because ultimately, your team should be leading the charge in delivering learning experiences that your stakeholders need to be maximally effective.

How To
Try using the principles in a self-rating exercise. Write each principle on a single index card, creating a stack of ten unique cards for each member of your team. In a brief session have each member write an example of how the current L&D team does or does not exhibit each principle. After individual reflection, post the cards on the wall for the team to access.

If you could improve the team’s current capabilities, which principle would you look to change first?

Outcome
These principles are guideposts for both creating new organizational beliefs and articulating how teams would like the organization to define the role of L&D. If used as a rubric for L&D performance, note that incrementing change on any one of the principles requires real effort. Prioritize and take steady small steps.

Principle	Definition
Putting People First	Development of people is viewed as an imperative. Conversations, thoughtful investments, and measurements that target the appropriate level of people development are the top priority across the entire organization.
Ecosystems Thinking	Organizations are complex. To serve them, we need to see them as value-driven ecosystems. In our organization, we think about developing people in terms of connections, resources, and journeys. We actively seek to evolve and align the elements of the learning ecosystem with a growth mindset.
Connective Collaboration	Connected and trusted collaboration is critical. Our L&D function catalyzes unfettered and open collaboration across the organization. We nurture personal trust to grow organizational trust.
Purpose-Driven Design	Purpose is a necessary component of every effort in an ecosystem. We pursue purpose using empathy and design thinking to bring the greatest impact to the business and its people.
Problem Seeking	Thoughtful problem articulation is critical to maintaining adaptive ecosystems. Our focus is identifying and prioritizing problems through the careful consideration of business outcomes. This is emphasized more than the solution design itself.
Data-Informed Strategy	Executing data-informed strategies with increasing fidelity is critical to an adaptive learning organization. Strategies are informed by the analysis and exploration of the data footprint of learning activity, behaviors, and outcomes. Data and meaningful partnerships with SMEs, processes, and statistics are used to plan initiatives based on their ROI.
Valued Perception of L&D	L&D functions as the central nervous system for the business. The free flow of information to and from the learning organization fosters valued business outcomes.
Ideas and Feedback	New ideas and feedback are required to accelerate development of solutions. Our L&D organization catalyzes and propagates a free flow of information and ideas. We seek feedback and evaluate data constantly without fear of failure.
Focus on Outcomes	Being busy and being productive are not equivalent. Our team seeks to impact positive change rather than reflexively treating the symptoms of deeper problems.
Technology is Just One Component	Technology is a tool and a component of a learning ecosystem, but it is not the solution for every problem. Our organization values the alignment of people, processes, experiences, and analytics. All of these are underpinned by technology in direct support of business strategy.

learning ecosystem canvas

The goal of the Learning Ecosystem Canvas is to create a visual framework and set of elicitation questions, which put a “lasso” around the complexity of your world. It can be used stand alone or in conjunction with other Design Thinking tools to capture data about the current and desired future state of learning in an organization.

The canvas is a derivative of the Business Model Canvas (Osterwalder 2008), customized to describe the tools, influences and people involved in learning and development. The Learning Ecosystem Canvas describes nine elements, with important interrelationships which are critical to the development of effective learning strategies. These nine elements are as follows:

1. Value Proposition – what value are you delivering to your users?
2. Learning Relationships – what relationship will users have with the ecosystem?
3. Learner Segments – what types of learners and journeys are in the ecosystem?
4. Channels – what are the ways that learners will be reached?
5. Value Metrics – how do you know that you are delivering value?
6. Partners – who are the partners you need to deliver the value?
7. Activities – what activities must be taken to build the ecosystem?
8. Resources – what resources are available and needed to deliver the value proposition?
9. Investment Drivers – what investments are needed to enable the ecosystem?

How To
As the current and future view of an organization’s learning ecosystem is complex, a diverse group of stakeholders should ideally be at the table (and in the same room) to collect data and ideas using the Learning Ecosystem Canvas. Included in the team should be members from L&D, HR, and IT. A large organizational cross-section should provide data and vision for a holistic approach to mapping the current and future state of a learning ecosystem.

During the session the team first brainstorms each element of the canvas on sticky notes silently. After ideas have been generated, the canvas is explored together one section at a time. Duplicate ideas are stacked and recorded.

Outcomes
A completed canvas will help narrow focus and scope so pilots, prototypes, and projects can be produced to quickly validate assumptions and show value. Additional exercises on a Learning Ecosystem Canvas can also help uncover the following:

- Priority of items in elements
- Priority of items across elements
- Illuminating connections between different elements
- Needed items that are not in play currently
- Clear ideas of risk associated with elements
- Items that are needed but not in the realm of control
- Items that need not be addressed
- Early wins that impact value metrics

Learning Ecosystem Canvas with Probing Questions

Partners	Activities	Value Proposition	Learner Relationships	Learner Segments
Who is on your team internally to deliver the value proposition?	What are you currently doing to deliver this value proposition?	What value proposition do you wish to deliver to your learners?	When your learners experience learning, what words would they use to describe the experience?	What are the different types of learners in the organization?
Who is on your team externally?	What do you want to do that you have not yet started?		What words would you want them to use?	What are the key journeys that they undertake?
Who is not on your team that you need?	What else do you think you could possibly do given no constraints?		What words would you want them not to use?	What are their most important journeys?
Resources				Channels
What resources do you have at your disposal to deliver the value proposition?		In what ways do you currently reach your learners?		
What resources do you need that you have?		How do you envision engaging learners in the future?		
What resources do you need that you do not have?		What ways do you not wish to engage them?		
Investment Driver		Value Metrics		
What investment is needed to deliver new partners?		How do you measure impact of the value proposition today?		
What investment is needed to get the necessary resources?		How might you measure impact of the value proposition in the future?		
What investment is needed to undertake activities?		What key processes and KPIs do you wish you could connect learning and performance to?		

Sample Learning Ecosystem Canvas

Partners	Activities	Value Proposition	Learner Relationships	Learner Segments
Internal ISDs	Define learning paths	Our teams provide opportunities for intentional and relevant learner journeys for continued professional development towards enhanced collaboration to close development gaps, build common language and culture, and drive business results.	Right time, right thing	New hires
External performance consultants	Technology selection		Learners are confident, delighted, and inspired	High potentials
Willing executive sponsors	Develop competency model		Easy to access	1st time managers
	Develop instrumentation strategy		No boundaries	
Resources	Roll out pilot		On demand	Channels
4 ISDs			Fit for me	Today: LMS & web
1 PM				Tomorrow: Learning paths aggregated experiences, mobile, anywhere
Vendor				
IT budget				
Investment Driver		Value Metrics		
New front end web aggregation		Today: Completions, attrition, total course		
Design process change		Tomorrow: KPIs that matter, NPS, speed of skill acquisition, competency and capacity, learning progression, adaptive on-boarding time		
New instrumented digital learning experiences				

behavior catalog

The Behavior Catalog™ is a tool for identifying discrete behavior targets that would contribute significant value. The value of a successful outcome to the organization is identified at the top of each chapter (see example, right). Represented either as a range of potential value or a discrete dollar amount, the total impact of performance becomes easy to communicate to any stakeholder in the business.

By organizing performances into chapters, the entire catalog is essentially the business outcomes everyone is focused on (positive, negative, strategic). This model can be used in conjunction with role-based curricula; however, it’s easy to justify and prioritize spending based on identified business outcomes.

How To
Identification and collection of behaviors can be done in a multitude of ways. One technique is to use Fractal Process-Asset modeling, detailed in work by Elias, Bider & Johannesson 2014. No matter which organizational mapping tool you use, the essence of creating a single chapter is to answer the following questions:

- What are the critical behaviors of this process/procedure?
- Who (“actor”) performs the behavior?
- Is the actor limited to following directions? Do they need to do more?
- Are the behaviors measured? Can they be measured or tied to current KPIs?
- Is there risk to the business and/or actor or others if there is non or sub performance? If yes, what are the potential consequences?
- Can talent be hired or must the behavior be trained?
- Does compensation or management drive performance?
- What is the frequency the behavior is performed?
- How many roles and individuals perform the behavior?

Outcomes
After having successfully completed the creation of a few chapters, the fun of creating optimal priorities for training development begins. With a 1:1 measurement of Business Objective per Revenue Outcomes elicited at the top of each chapter, an L&D team can track business impact first and smile sheets last.

Chapter Template

Business Objective: _____
Revenue Outcomes: _____

Behavior	Actor	KPI	Performance Outcome	Rx	Skill

Example Chapter

Business Objective: Obtaining a signed Master Service Agreement (MSA) new client
Revenue Outcomes: \$50k - \$1m per client

Behavior	Actor	# of	Driver	KPI	Freq	Risk	Perf. Outcome	Rx	Skill
15 min needs analysis (rec & shared)	inbound	8	Perf. Report	% qualified leads	Daily	5	Remember & Follow	Challenge & Simulate	Trained
Project cost estimated	sales, lead	4	Bonus	Margin \$	Daily	5	Expert	Challenge & Simulate	Trained
Prototype solution (reach shared vision)	engineer	4	Perf. Report	# Prototypes	Weekly	3	Expert	Challenge & Simulate	Trained
Approve custom media budget					Weekly	2	Follow Instructions	Provide Information	Hired
Initial meeting scheduled	inbound	1	Bonus	% qualified leads	Daily	2	Follow Instructions	Practice	Hired
Legal documents reviewed	contracting	3			Weekly	2	Follow Instructions	Provide Information	Hired
Custom treatments drafted	media	6	Hourly \$	# Prototypes	Weekly	2	Expert	Practice	Hired
Demonstration of solutions	engineer	20			Daily	3	Expert	Practice	Trained

learning innovation building blocks

Focus	Building Block	Ideas
Configuration This areas focuses on how the learning organization itself is constructed and connected in the context of the organization.	Value Metrics	How might we measure the value we are creating?
	Network	How might we connect with others to create value?
	Structure	How might we internally organize and align our talents and assets to create value?
	Process	How might we use signature or superior methods to do our work?
Offering This area focuses on the relationship, features, and functionality that the learning ecosystem itself provides.	Ecosystem Performance	How might we develop distinguishing features and functionality?
Experience This area focuses on learner facing elements of the learning organization and ecosystem	Service	How might we support and amplify the value of our offering?
	Channel	How might we deliver our offerings to our users?
	Brand	How might we represent our offerings to our users?
	Learner Engagement	How might we foster compelling and ongoing interactions?

Boring is bad. There isn’t a student on earth that wants to be bored to death in training. From executives to instructional designers, our first instinct when employees complain that training is boring and bad, is to try something innovative.

Bill Aulet, author of *Disciplined Entrepreneurship*, defines innovation in the following way:

Innovation = Invention x Commercialization

Invention is the discovery of items that might bring innovation. Commercialization brings solutions to fruition, essential realizing the invention.

Larry Keeley, author of *Innovation Building Blocks*, has also done significant work on understanding innovation. In his model, he outlines three major focus areas and ten building blocks for product/solution innovation. The key to his work is knowing that organizations that are innovating in five or more of the building blocks have a significant advantage in their market—whether it be stock price, market position, or valuation. We have adapted this model for inventing, exploring ideas, and creating design questions to bring innovation into learning ecosystem design.

How To
Team Brainstorming
Introduce the purpose of the building block framework. Following this, provide a few concrete examples to get people oriented to each block. Use timed sprints of 15-20 minutes to ideate, capture, explain, and add items to the model. Continue to run iterations as long as the team is adding ideas and digging deeper into how any idea would be implemented.

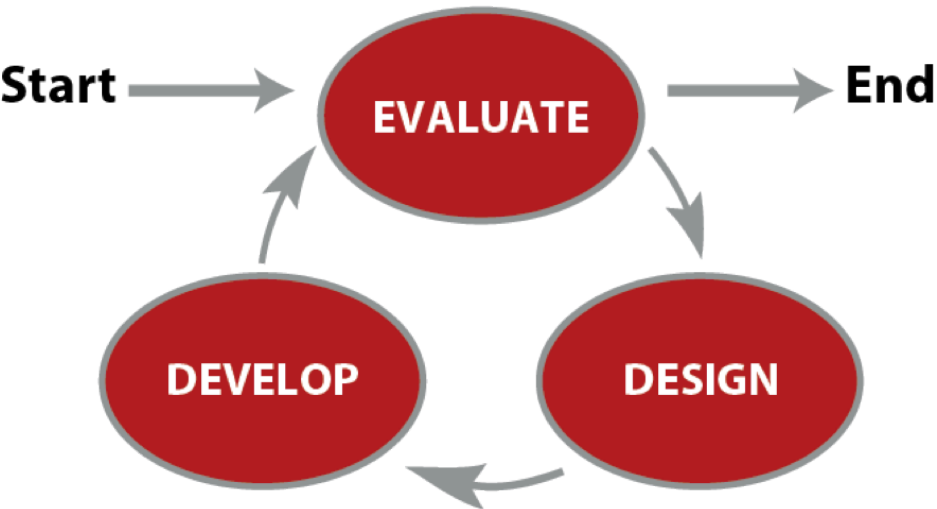
Silent Writing
Used in team brainstorming, silent writing can be done in sprints of 5-10 minutes, in which individuals develop their own ideas silently. Then, each person adds their ideas to the appropriate building block and shares verbally to provide additional information. Silent writing allows for unbiased idea generation and often reveals who the most inventive thinkers are. Either revert back to team brainstorming or continue working in silent writing sprints as seen fit.

Competitive Exploration
In large groups, introduce the building block framework and then break into small teams. It may be appropriate to imagine teams now “work for a competitor” or a “brand new company” to remove constraint-based thinking. Asking teams to name themselves helps set a new context for ideation. After developing a complete building block framework each team takes a turn to present their results to the other teams.

Outcomes
Build a road map
The initial capture of data using the building blocks frame work is just the beginning. To evaluate the ideas with the most potential impact have teams work with stakeholders to identify the top ideas. A prioritized list of ideas can easily be turned into an innovation road map. Ideally the road map will include a time-line showing when the building blocks, ideas, and deeper design questions will be tackled.

successive approximation model (SAM)

SAM 1



SAM and other iterative processes have introduced great efficiencies in design and development, fostered creativity, and facilitated effective stakeholder involvement.

The Successive Approximation Model (SAM), the core of which is shown in the diagram above, incorporates contemporary design and development processes to both simplify instructional design and development, and produce more effective learning experiences as quickly as possible.

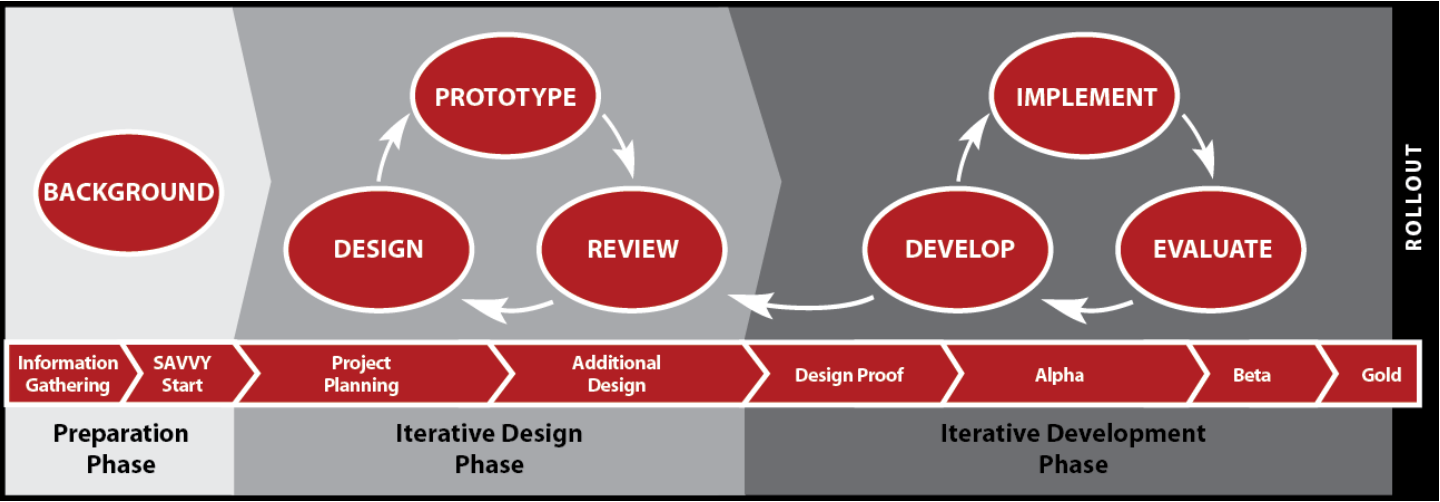
SAM involves making repeated iterations to be as open as possible to new ideas as they occur, make design corrections and move confidently toward the best product possible within time and budget constraints.

How To

At its core, successive approximation is a series of attempts to create an instructional experience that is meaningful, memorable, and motivational. Early iterations produce ideas to consider many of which will be set aside. Unsatisfactory designs are actually valuable and potentially illuminate the right path to an effective solution.

Each successive iteration takes what was discovered in previous attempts and refines the design. Sometimes the design will take a wrong turn, but that helps clarify the merits of previous design iterations. By executing this model rapidly using rough inexpensive prototypes, it is possible to avoid getting buried in technology and content detail too

SAM 2 - “Big SAM”



soon. Reaching for perfection too soon leads to costly mistakes.

The small cycle shown in SAM 1 is the heart of the rapid approach. Throughout the process stakeholders are included in design, development, and evaluation. The outcome of working this way is reaching shared vision as early as possible.

There are several resources available to get started using SAM including *Leaving ADDIE for SAM* and the *SAM Field Guide*, both published by ATD.

Outcome

SAM is the agile development model we use at Allen Interactions to ensure learning, retention, and business impact are achieved for organizations. It has proven to be effective through decades of use and refinement, no matter the size and scope of the project.

The multi-phase SAM 2 process (shown above) is used for larger and more complex projects. SAM 2 is still SAM using short iterative design sprints, expanded to build an interdependent and robust set of instructional experiences.

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