Four Practices to Embed Learning in the Flow of Work

Overview

Learning opportunities that support performance in real-time and are in sync with the work itself create opportunities for workers to learn in the flow of work. The convergence of learning and work has been occurring for more than a decade. In the last year, this phenomenon has earned the moniker "learning in the flow of work." As learning and work converge, organizations are trying to shift from a focus on courses, curricula, and programs to enabling worker performance and productivity in ways not measured in hours and completions. This challenge is magnified by changes in work itself—unpredictable, full of conflicting priorities and distractions, structured around cross-functional teams, more project-oriented, and less directed by a middle manager. This article introduces four leading practices that high-performing organizations are using to help workers increase performance and productivity without stopping, disrupting, or removing them from their work.

In This Article

- How organizations anticipate worker needs by understanding the work and how it gets done
- Why high-performing organizations augment performance with data, knowledge, and guidance
- The importance of staging the delivery of learning opportunities
- How organizations leverage and recognize learning in the flow of work
- Examples from leading organizations that have put these practices into place
What Is Learning in the Flow of Work?

In the 20 years since the paradigm of e-learning was first introduced, the world of learning and development (L&D) has been altered considerably. The advent of social media, readily accessible video tools, and the pervasive use of search engines to answer questions have changed the L&D landscape (see Figure 1). Organizations must now confront a critical decision: evolve how, when, and why workers learn, or risk falling behind in a world of work defined by continuous disruption. The L&D function can help maintain and develop a high-performing and productive workforce, which has the opportunity to impact the entire organization by shaping resilient, cross-functional teams capable of responding to—and getting ahead of—disruptions.
Josh Bersin has described *learning in the flow of work* as the “... new paradigm for corporate training” because it addresses how organizations actually operate. Learning in the flow of work embeds learning into the work itself, rather than removing workers from their jobs. Does this mean the end of traditional learning methods? Absolutely not. Traditional learning will continue to add value to organizations. With just 24 minutes available each week for learning, the opportunities lost by not providing learning in the flow of work are enormous.

High-performing organizations have recognized that learning is always occurring—both formally and informally. Capitalizing on those informal moments is how performance and productivity gains can really matter. Learning in the flow of work enhances learning opportunities continuously throughout a worker’s day. According to a recent study, two-thirds of respondents prefer to learn at work and nearly one-half prefer to learn at the point of need.

Learning in the flow of work extends beyond advances like worker-driven, on-demand learning. High-performing organizations enable workers to find the content they need on a learning platform by staging that content when and where they need it. To do this, these organizations first develop a deep understanding of the roles and tasks of each worker. Then, they are able to determine where in the natural flow of a worker’s day to place such learning opportunities.

**KEY POINT:** Learning in the flow of work enhances the learning inherent in the work itself.
In the following sections, we look briefly at these four leading practices:

- Anticipating workers' needs by understanding what workers do
- Augmenting worker performance with actionable and relevant data
- Accelerating learning opportunities by placing meaningful tools and information in the flow of work
- Recognizing, encouraging, and leveraging learning in the flow of work to empower and reward workers

**Anticipate Workers’ Needs by Understanding What They Do**

What are workers doing every day?

Job descriptions, competency frameworks, and organization charts are sometimes leveraged as tools for understanding what workers should be doing and situating that particular job within the context of the broader organization. However, work changes so often that these tools don't reflect what workers actually do. Consequently, high-performing organizations are taking this a step further by applying the tools and techniques of design thinking to observe and speak with workers throughout the organization so that they may more deeply understand how their workers actually spend their time (see Figure 2). As they do so, they seek to answer the following questions:

- What tasks are workers performing throughout the day?
- What do these tasks look like?
- What do all workers in the organization do?
- How does work vary from one part of the organization to another?
- With which teams and managers are workers interacting?
- Where are the pain points in workers' routines?
- What facilitates the work?

Without a granular understanding of how work is conducted in their organization, companies cannot leverage learning into the flow of work. Understanding the work at the function, role, and task levels allows high-performing organizations to shift the focus away from solely what workers need to be learning for the future and toward what actually enables workers to perform well now.
Developing journey maps is one way of illuminating how workers spend their day. After compiling their data, high-performing organizations build journey maps of the actual processes their workers experience throughout the day (see Figure 3).
High-performing organizations also build employee personas. This design-thinking technique involves creating a fictionalized person based on real people within the organization. For instance, after compiling data on call center workers, an organization could develop an ideal profile of those workers in order to understand their needs, wants, and common pain points as they go about their tasks (see Figures 4 and 5). Personas are powerful because they are tangible and actionable.

Design-thinking techniques are not only about the learning problems a worker faces. Journey maps and personas create a dynamic and empathetic understanding of an organization’s workforce. These techniques eliminate guesswork, instead defining what workers do so that performance and productivity solutions can be developed, tested, and implemented. Anticipating the needs of workers hinges on understanding the nuts and bolts of people’s work on the ground. By itself, anticipating needs does not put learning into the flow of work—but it is a necessary antecedent for achieving this goal.
Case in Point: Deutsche Telekom Uses Personas to Inform Training

Deutsche Telekom faced numerous challenges as it prepared itself for unprecedented digital disruptions within its industry. To enhance the overall employee experience and spark innovation within the HR space, the company interviewed and observed its workers to identify the needs and challenges facing its workforce across organizational units and international borders.

The insights from the interviews and observations and real-world testing led to the development of 22 prototype personas. The persona tool has been used to target and enable training formats and learning methods based on employees' needs (see Figures 4 and 5).

Figure 4: Deutsche Telekom Persona Usage

Source: Deutsche Telekom, 2017.

(cont’d on next page)
Figure 5: Example Personas at Deutsche Telekom

Source: Deutsche Telekom, 2017.
Call to Action

- Get out from behind your desk to see your workers in action. Watch them to observe what the work is and how they do it.
- Observe, ask, and listen to identify pain points and enablers. Surveys are a tool to use at scale, but interviews create higher levels of empathy and connectivity.
- Worker experiences vary widely across the organization. Observe a variety of workers to really understand the diverse experiences and challenges of workers in different functions and roles.
- Work changes all the time, so observation and listening must be ongoing. Ask about how the work might evolve to anticipate when and how workers’ needs could change.

Augment Worker Performance with Actionable and Relevant Data

High-performing organizations readily share data and knowledge with and offer guidance to their workers. When these organizations also take the time to deeply understand work roles and tasks, they are positioned to offer relevant, actionable information that leads to improved performance and productivity.7

As the world of work experiences incredible disruptions, the workforce of high-performing organizations is able to adjust their performance in real-time. Consider the experience of driving a car: newer vehicles have a dashboard providing real-time data on speed, engine temperature, and fuel level and provide alerts for low tire pressure, washer fluid levels, and oil. The latest models also have GPS data, lane alerts, and rearview cameras. From the moment a driver gets into the car, signals, alerts, warnings, and reminders allow the driver to adjust in real-time. This information is relevant only to driving the car in its current location. Similarly, high-performing organizations know from their journey maps and personas which information is critical to share and which distractions to filter out.

Identifying Relevant Data

How do organizations know that their workers are receiving the right data?

High-performing organizations develop relationships with data experts across functions and informally audit the data that is being captured.8 Gaining access to cross-functional people metrics requires an outside-in partnership mindset and an emphasis on building trust with business leaders.9

Qualitative data, such as feedback from peers or managers, is just as valuable as quantitative data when it comes to augmenting performance. Our High-Impact Performance Management study shows that high-performing organizations provide workers with real-time peer feedback about their performance and contributions—helping them understand strengths and opportunities for improvement.10
Case in Point: Cellular Sales Improves Business Outcomes by Sharing Real-Time Data

Cellular Sales is a mobile device reseller with 5,000 employees across 675 locations in North America. The company’s challenge was retaining associates and providing career growth and incentives. Previous programs were administratively burdensome and did not impact the business.

The organization implemented a tool so that associates and managers can view their performance against nine key performance indicators 24/7. The system also offers real-time coaching prompts within the tool to help them hit their goals. The company saw improved sales where the tool was in use; they also observed that workers’ engagement in their role correlated to participation in the performance tool. When workers began using the tool less frequently, managers would meet to assess if the worker was disengaged.

Call to Action

- Identify and look for ways to leverage the quantitative and qualitative performance data already being collected by your organization outside the L&D department.
- Share people data that relates to functional areas’ operational goals.
- Share performance data with workers by placing it around their workplace (physical) and in the software systems they use (technological).

Accelerate Learning Opportunities by Placing Meaningful Tools and Information in the Flow of Work

How learning is delivered to workers in the flow of work will impact how meaningful the learning becomes. High-performing organizations appropriately stage information, tools, and support. Overwhelming workers suddenly with learning opportunities or with inappropriate delivery methods causes workflow to break. In-the-flow approaches occur in four contexts—environment, exposure, experience, and education (see Figure 6). Selecting the best delivery method from among “the four Es” encourages accelerated learning and worker adoption.
Each of these four learning contexts has associated delivery methods (see Figure 7). However, the four Es are designed to promote flexible, structured learning. Delivery methods can be moved between contexts and vice versa. Using the four Es in various combinations allows organizations to offer workers what they need to enable performance. This aligns with learning in the flow of work, which requires considering multiple contexts and delivery methods. For example, delivery methods such as e-learning courses, books, and articles fit the education context, but when
delivered where workers are—such as within software used every day—these delivery methods become part of the environmental context. High-performing learning functions collaborate with business units to select the most appropriate learning context and delivery methods to create opportunities for workers to organically learn and grow.

**Figure 7: Learning Contexts and Delivery Methods**

<table>
<thead>
<tr>
<th>Context</th>
<th>Delivery Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td>The tools, resources, physical spaces, and virtual spaces workers inhabit</td>
</tr>
<tr>
<td>Exposure</td>
<td>Interactions with people and groups of people, both formal and informal</td>
</tr>
<tr>
<td>Experience</td>
<td>Special work projects, stretch assignments, developmental work</td>
</tr>
<tr>
<td>Education</td>
<td>Classroom, self-paced, and blended learning familiar to learning professionals</td>
</tr>
</tbody>
</table>

*Source: Bersin, Deloitte Consulting LLP, 2019.*

**Case in Point: Capital One Embeds Learning Content for Technology Associates inside the Development Environment**

Capital One is evolving to become, as the company puts it, an information-based technology company. It supports nearly 9,000 technology associates through its Tech College, an initiative sponsored by the CIO. Almost one-third of Tech College is staffed by technology associates. Based on their input, the college’s content is accessible through GitHub, a common software development environment that is connected to the Learning Hive, their branded learning experience platform. Workers seeking content and resources can search and find the content inside GitHub, and their participation is captured in the Learning Hive via xAPI. New offerings, experiences, and learning resources are promoted using Slack, a collaborative communication software, to minimize distractions and the need for email.

**Call to Action**

- Use observations and understanding of workers’ challenges to identify what, where, and when learning should be staged.
- Make job-aids available—both digitally and in hard copy.
- Provide access to knowledge / expertise outside the confines of traditional classrooms and within the workspace when appropriate.
- Rely on stakeholders doing the work to help determine which
Four Practices to Embed Learning in the Flow of Work

recognizes, encourages, and leverages learning within the flow of work to empower and reward workers. Learning happens all the time—both inside and outside the traditional classroom setting. High-performing organizations understand that learning can happen at any time. They encourage it wherever it does happen, they communicate that learning is part of everyone’s job, and they leverage learning as an intrinsic component of a worker’s day. When learning is supported like this, workers feel empowered to push their own performance and take appropriate risks.

But how can learning leaders capture the learning that happens outside the classroom? Technology is enabling learning functions to pick up learning in the flow of work, as demonstrated by the Capital One case in point. As technology evolves, more options for capturing this data continue to appear in the marketplace.

For example, xAPI and learning record stores (LRS) capture evidence of learning activity—however it happens—and make it visible to individuals and their organizations. This must, however, be complemented by reflecting on those activities mindfully to help individuals recognize what was learned and how the learning impacted the individual, team, and organization. Rituals that celebrate learning that happens naturally—talking about learning from mistakes, rewarding measured risk-taking, and experimenting with different approaches—can be encouraged by L&D and embraced by business leaders to create a learning culture.

Empowerment is another component to leverage learning naturally. Through this approach, workers are empowered to make choices about how they learn, collaborate, and work. Organizations like Spotify have shifted toward managing small groups to project outcomes that encourage innovation. Cisco has taken a different approach by defining a set of eight outcomes for all project teams but not prescribing any methods by which to achieve those outcomes.

Multiple studies have enabled us to identify four means by which mature learning organizations empower their workers:

- Encouraging the workforce and leadership to ask questions
- Having clearly defined decision-making processes
- Encouraging employees to take measured risks
- Permitting employees to have influence over which job tasks are assigned to them
Case in Point: Instructure Empowers Learning with Problem-Solving

Instructure Inc. designs learning and employee development software for educational institutions and corporations. Its more than 1,200 workers are deeply committed to educational issues and ideas. One way in which learning happens at Instructure is through client spotlights.

Team members for a corporate HR product hold a twice-a-month town hall meeting. At each session, a client success team member shares a case study that summarizes a client concern or problem. Afterward, everyone, regardless of role, can offer ideas for addressing the problem by uploading a video with a proposed solution. Team members vote, and the top-voted videos are shared at the next town hall. The entire group then decides which solution moves ahead.

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Case in Point: Instructure Empowers Learning with Problem-Solving (cont’d)

This is a direct inducement for knowledge-sharing built right into the way work gets done in this group. The very structure of the client spotlight process sends a clear message that employee learning and risk-taking are valued.

Call to Action

- Allow employees influence over tasks they perform both in when and how they learn as well as in how they collaborate and solve problems.
- Define decision-making protocols at all levels so that workers know what they are empowered to do without needing to seek approval.
- Encourage open and collaborative decision-making processes to solve problems, demonstrate trust in workers, and empower workers to take on tasks they have identified.
- Encourage and reward risk-taking through structured experimentation as well as through communication and recognition.

Conclusion

The convergence of learning and work has created new challenges for the L&D function, bringing L&D out of HR and into the lifeblood of the organization. Organizations are experimenting with how best to embed learning the flow of work, and high-performing organizations are finding success with these four leading practices.

With intense disruptions at the fore in the new world of work, the opportunity to bring learning into the flow of work enhances individuals’ and teams’ capabilities without interrupting daily workstreams. These leading practices enable performance and productivity by helping workers be better at what they do at the very moment they do it.

The remaining articles in the Learning in the Flow of Work series will take a closer, more in-depth look at these leading practices, and more. Stay tuned—we’re just getting started.
Key Takeaways

- High-performing organizations enable performance and productivity with four leading practices: anticipating needs, augmenting performance, accelerating learning, and leveraging recognition.
- Anticipate needs as a precursor to staging learning in the flow of work.
- Dive deep into understanding workers’ daily work experiences, how workers perform tasks, and opportunities for improvement.
- Identify which education, experience, environment, or exposure tactics will help workers perform, and embed them based on an understanding of workers’ challenges.
- Provide real-time information (quantitative and qualitative data) so workers know how they’re performing.
- Encourage rituals that celebrate natural, organic learning and reward appropriate risk-taking.
Endnotes

13. The “Experience API” (xAPI) e-learning specification, also known as the “Tin Can API,” is the product of an Advanced Distributed Learning (ADL) Initiative (from the U.S. Department of Defense, www.adlnet.gov) to develop a runtime application programming interface (API) that captures data on a person’s learning activities other than using courseware (e.g., social and informal learning, and other activities). The development goals of the xAPI are to meet the expanding needs of online distributed learning and to be the next generation of SCORM (sharable content object reference model).
14. A “learning record store” (LRS) is a repository for storing the learning records of a company’s employees, for example. LRS data can be accessed through a learning management system (LMS), reporting tool, or other LRS. An LRS can be a part of an LMS or stand on its own.
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