How To Accelerate Learning Transfer Through Competency-Based Learning

Presented By: Cheryl Lasse

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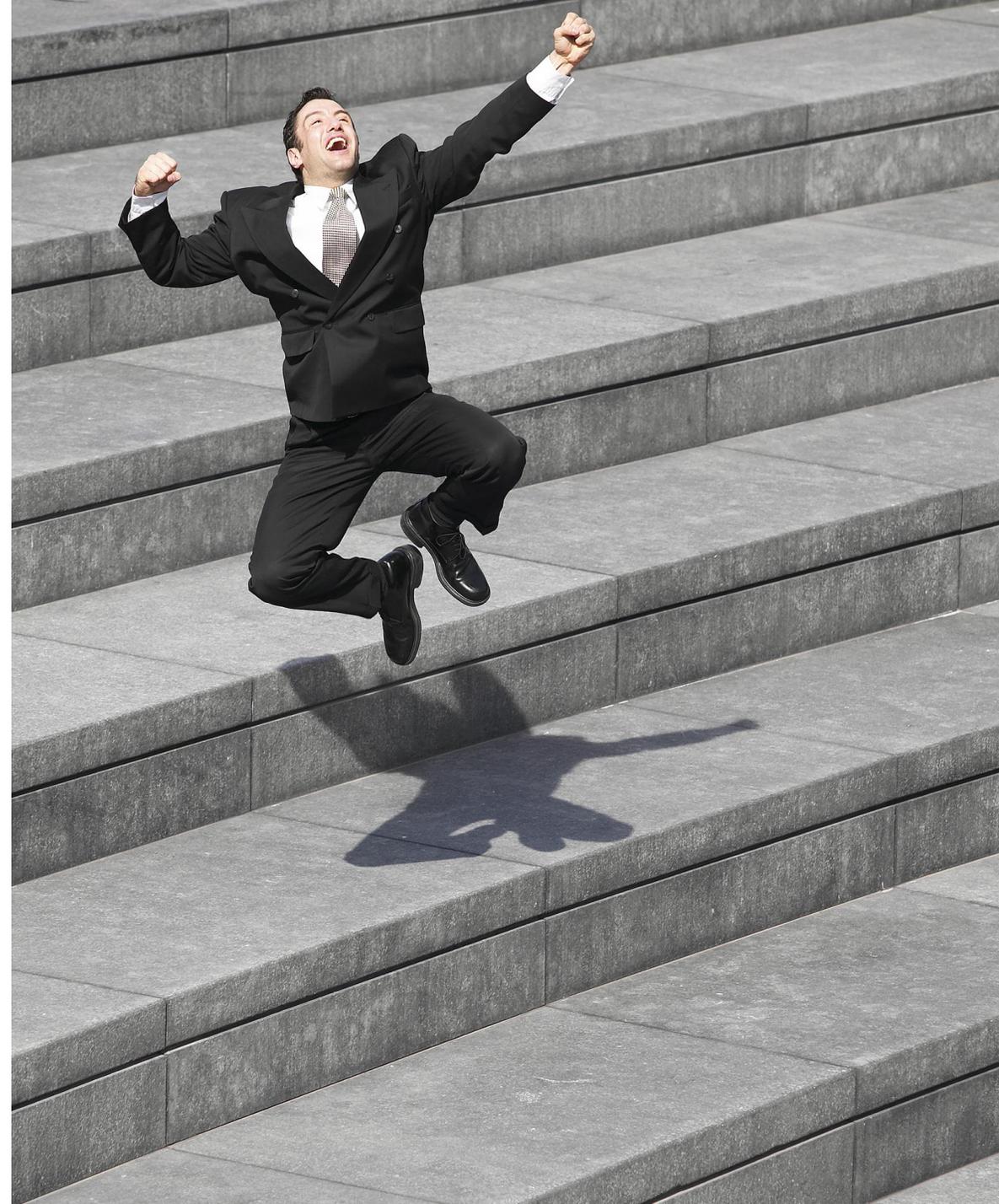
Other Webcasts you may want to watch based on questions

* How to Build a Competency Model in Record Time
  http://webcasts.td.org/webinar/2235 AND http://webcasts.td.org/webinar/2644

* How to Use Standard Competency Models to Accelerate Learning Transfer
  http://webcasts.td.org/webinar/1809

* Create Informal, Competency-based Learning In Only 1 Day
  http://webcasts.td.org/webinar/2642

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Other Articles you may want to read based on questions

- Why employees taking charge of their learning is good for you (millennials) – Including how to sell it internally!

- The value of competency models

- How can my company use competency models

- Using competency models for mentoring

- Using competency models for coaching

- 3 Traits that will make you a Learning & Development rock star in 2020

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Webcast Objectives

✹ How to link competency models to **existing** learning opportunities

✹ How to use competency models to identify learning opportunities you need **to develop** (fill gaps)

✹ How to keep your mapping current

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Competency Models

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HR / Talent / L&D	Manufacturing	Distribution	Sales	Marketing	Service
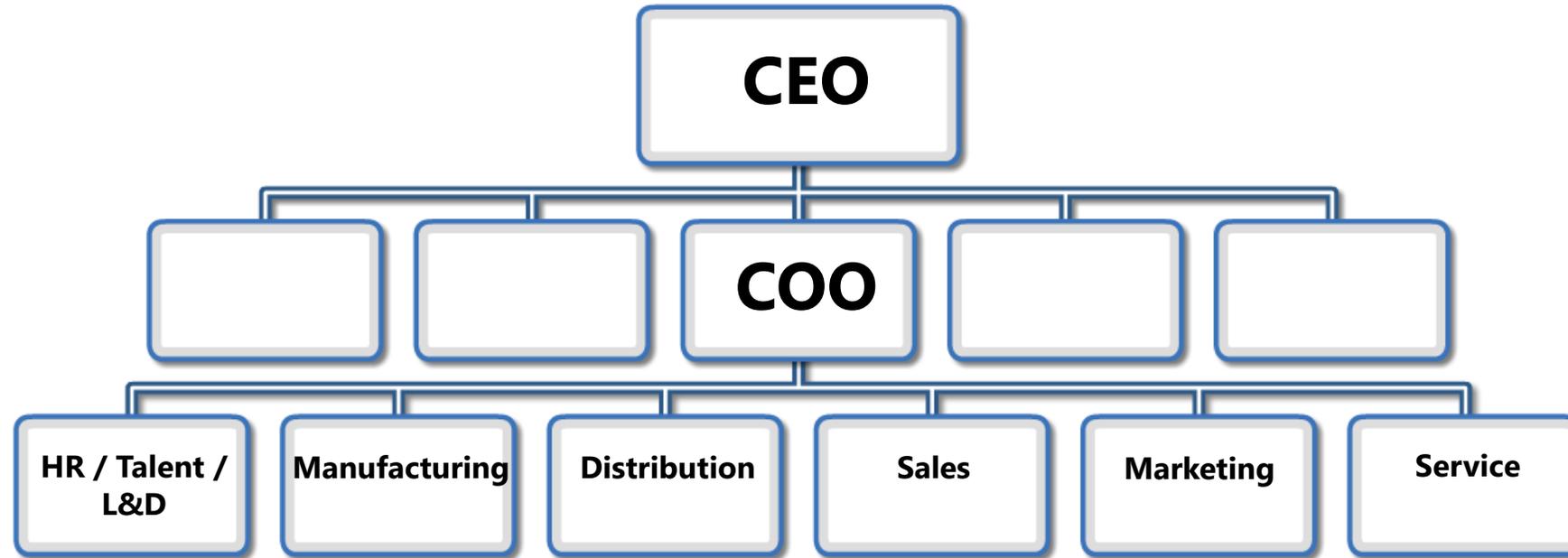
Ensure that people in the organization have the ability to DO their job and grow into other roles.

A competency model describes what each person in their role needs to be able to do, specifically, in order to perform their part of corporate strategy

A competency model describes to each person what it looks like to be GREAT in your role

Why Competency-Based Learning accelerates learning transfer

We crave mastery

Intrinsic motivation to act and consume competency-based learning

Competency Models

Consistently deliver customer-focused presentations

Level	Examples
5 - Expert	• Consistently influence others (when appropriate) at all organizational levels • Build templates and tools for enabling customer-focused presentations, capturing the motivation, needs and requirements of stakeholders • Anticipate questions and proactively answer them with data and persuasion before objections arise • Craft a persuasive argument on-the-fly to neutralize dissenters • Actively pursue communication effectiveness improvement opportunities (e.g., soliciting feedback) • Demonstrate Skilled behaviors

4 - Skilled	• Achieve influence and impact even when holding a position contrary to the majority
	• Perform thorough research before building any presentation
	• Use a structured technique for communication preparation
	  ○ Anticipate objections and have a response
	  ○ Plan for contingency
	• Accommodate different learning styles
	  ○ Present clear, easy-to-understand information orally
	  ○ Support information with examples
	  ○ Use visual aids, slides, graphs
	• Use multiple presentation tools and media to maintain audience interest/engagement
	• Customize communications to the audience
	  ○ Present recommendations to peers tactfully
	  ○ Translate technical to layman's language and vice versa with ease -- speak the audience's language
	• Interpret non-verbal and verbal cues to alter my messaging
	• Advise others on tailoring the message to adapt to others' cultures and perspective, especially when communicating with globally diverse audiences
	• Demonstrate Applied behaviors

3 - Applied	• Use a customer-focused approach to presentations – ensure every presentation has a purpose and delivers value
	• Research the role and background of stakeholders before the presentation
	  ○ Ask probing, open-ended questions about their needs
	  ○ Ask "why?"
	  ○ Talk to peers about stakeholder motivations, needs, and requirements
	• Plan presentations to weave supporting data throughout to support recommendations and timing considerations
	• Use presentation tools (Microsoft PowerPoint, Teleconference tools)
	• Can prepare a concise, motivating and persuasive presentation
	  ○ Use clear and concise communication (e.g., bullet points, summaries, etc.)
	  ○ Emotional/inspiring visuals that support my message
	• Use active listening techniques

2 - General	• Use proper grammar and spelling in presentations • Proof my work before delivering • Can prepare a complete, logical presentation • Gather appropriate supporting data and have it available should the need arise
1 - Limited	• Successfully help others to understand my agenda • Focus on the speed of preparing a presentation, more than the quality • Am great at "winging it" – can deliver a presentation without much preparation

Skills/tasks grouped into competencies or task categories

Behavioral examples that show what each skill or task looks like at various levels of proficiency

A target level of proficiency

What is a competency?

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Terminology: "Learning Opportunities"

~10%
Formal Learning
(classroom, eLearning, webinars)

~20%
Collaborative
(coaching, mentoring, working with peers, feedback, communities of practice)

90%
Informal Learning (not formal)

~70%
Experience
(skill practices, performance support materials (job aids, templates) and systems (how to tutorials), on the job learning)

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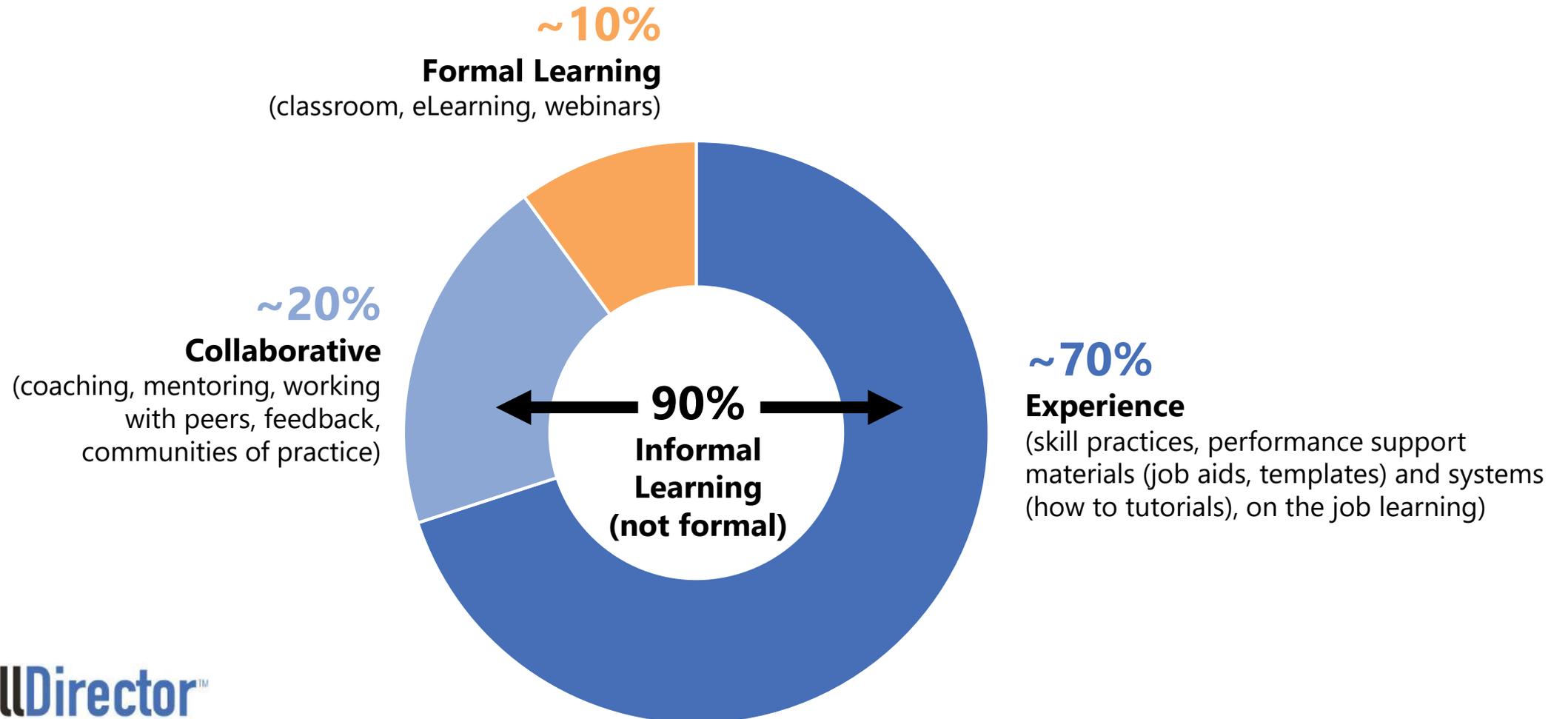
Terminology: Competency & Task
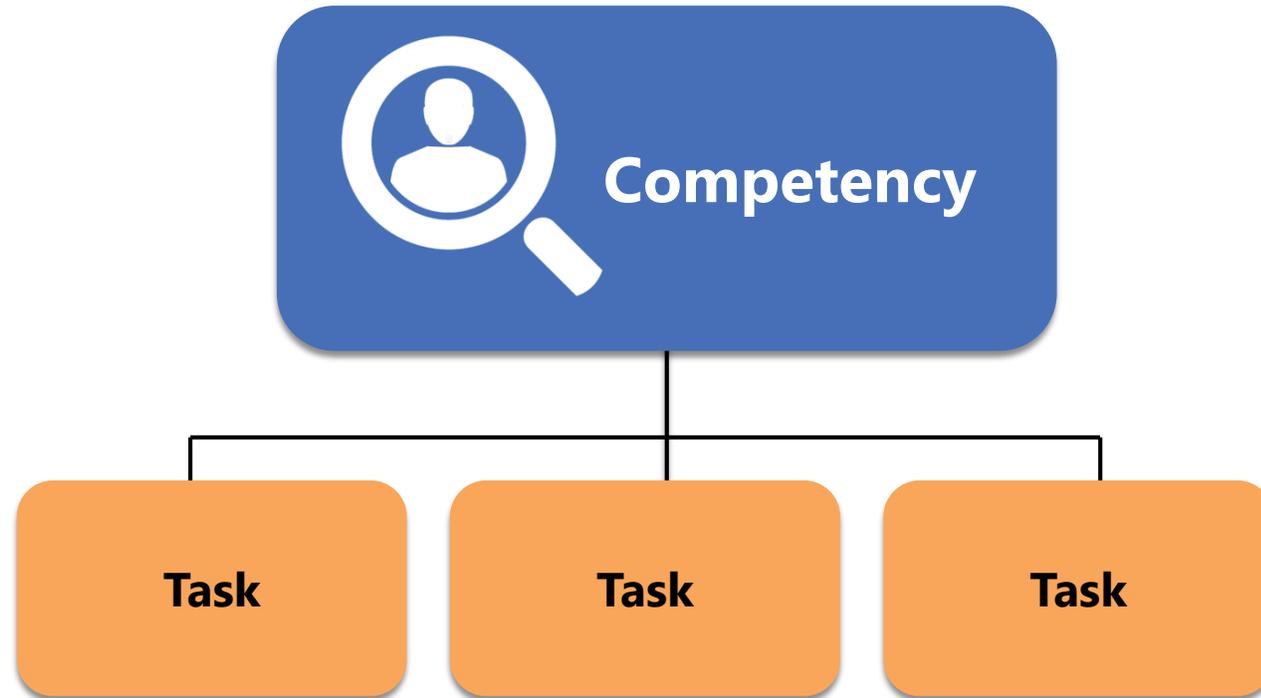
Competency-Based Learning

Task: Consistently deliver customer-focused presentations

This task could be in any of these 3 competencies.

Competency	Competency	Competency
Communication	Account Management	Field Service Delivery

If you try to map to the competency, instead of the task, you might select vastly different learning opportunities that would not address the skill of a person in this role who needs to perform this task.

Competency-Based Learning

Task: Consistently deliver customer-focused presentations

Level 3 Examples	Learning opportunity whose learning objective matches the examples
Use a customer-focused approach to presentations – ensure every presentation has a purpose and delivers value	Presentation Skills classroom course

Research the role and background of stakeholders before the presentation
  o Ask probing, open-ended questions about their needs
  o Ask "why?"
  o Talk to peers about stakeholder motivations, needs, and requirements	

Plan presentations to weave supporting data throughout to support recommendations and timing considerations	
Use presentation tools (Microsoft PowerPoint, Teleconference tools)	Using Microsoft PowerPoint eLearning

Can prepare a concise, motivating and persuasive presentation
  o Use clear and concise communication (e.g., bullet points, summaries, etc.)
  o Emotional/inspiring visuals that support my message
	Presentation Skills classroom course

Use active listening techniques	

Competency-Based Learning at THIS level of granularity

Essential if you want to ensure what you create or deploy…

- Is relevant

- Supports corporate strategy

- Creates the **best opportunity** for learning transfer to occur

- Closes skill gaps

It **accelerates learning transfer**
because the individual performing the learning opportunity
knows it's relevant and they buy into it.

What happens if you DON'T apply competency-based learning
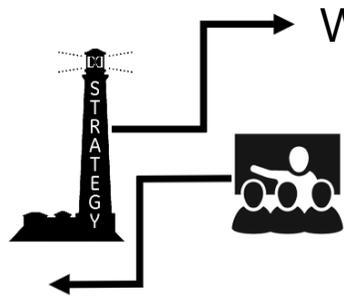
WASTE: Develop/buy activities that don't support skills people need to have

Don't have learning opportunities that enable people to close skill gaps, and the skill gaps grow

Make it likely that someone with a skill gap will consume content that won't help them, so they will become disengaged with L&D and try to close skill gaps on their own

People will get frustrated with the inability to do their jobs, and will leave

Steps for Competency-Based Learning

1 Itemize your learning opportunities (Curriculum Analysis)

2 Map existing learning

3 Fill gaps

One job role or job family at a time

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Step 1) Itemize your learning opportunities

Familiarize

	Job Title	Competency / Task Category	Skill / Task	Behavioral Example	Required Proficiency
5	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Use a customer-focused approach to presentations	Applied
6	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Research the role and background of stakeholders before the presentation o Ask probing, open-ended questions about their needs o Ask "why?" o Talk to peers about stakeholder motivations, needs and requirements	Applied
7	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Ensure every presentation has a purpose and delivers value to the recipient(s)	Applied
8	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Plan presentations to weave supporting data throughout to support recommendations and timing considerations	Applied
9	Field Services Manager	Communication	Consistently deliver customer-focused presentations	Can prepare a concise, motivating and persuasive presentation o Use clear and concise communication (e.g., bullet points, summaries, etc.) o Emotional/inspiring visuals that support my message	Applied
10					

Search

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**Curriculum Analysis**												
2													
3											Optional Fields		
4	Activity Cod	Type (e.g., classroom, eLearning, webinar, job aid, template, video, checklist	Training Activity Name/Description	Link To Activity, Asset, or person (regardless of where it is located	Module Name (only if it is a part of a larger activity)	Learning Objectives (this should not be a description -- it is important that this be actual terminal learning objectives if they exist)	Duration (hours)	Price ($)	Proficiency Achieved With Activ	Notes	Date Create	Date Last Revised	Reviewer (SME who coul ensure it is current)
5	KYCFM_Basic	Classroom	Know Your Customer's Financial Model	[link to LMS signup page]		• Identify key financial drivers that drive decision making. • Describe how power companies make money. • Analyze how company impacts financial drivers. • Demonstrate the effect your decisions have on the financial results of your company and your customer. • Illustrate how to sell profits and value rather than products or services.	12	500	3	Designed for sales people and those who have some sales responsibilities	1/1/2006	12/1/2015	John Smith
6													
7													
8													
9													
10													

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Step 1) Itemize your learning opportunities

Put identified items in the template

Learning objectives are **key** to the mapping process

	A	B	C	D	E		N	O	P
1	**Curriculum Analysis**								
2									
3									
4	Activity Code	Type (e.g., classroom, eLearning, webinar, job aid, template, video, checklist)	Training Activity Name/Description	Link To Activity, Asset, or person (regardless of where it is located)	Module Name (only if it is a part of a larger activity)	Learning Objectives (this should not be a description -- it is important that this be actual terminal learning objectives if they exist)		Communication	Financial Analys
5	HMCMM_001	Classroom	How My Customer Makes Money	[link to LMS signup page]		• Identify key financial drivers that drive decision making. • Describe how your customers make money. • Demonstrate the effect your decisions have on the financial results of your company and your customer. • Illustrate how to sell profits and value rather than products or services.			x
6	Template_001	Template	Presentation needs analysis template			Use this template to identify the needs and motivation of presentation participants		x	
8									

Resource: Curriculum Analysis Template.xlsx

Categorize for easy mapping

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Competency-Based Learning Timeframe

Unless you have no content

Week 1

Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
Begin Curriculum Analysis				Could take through end of day
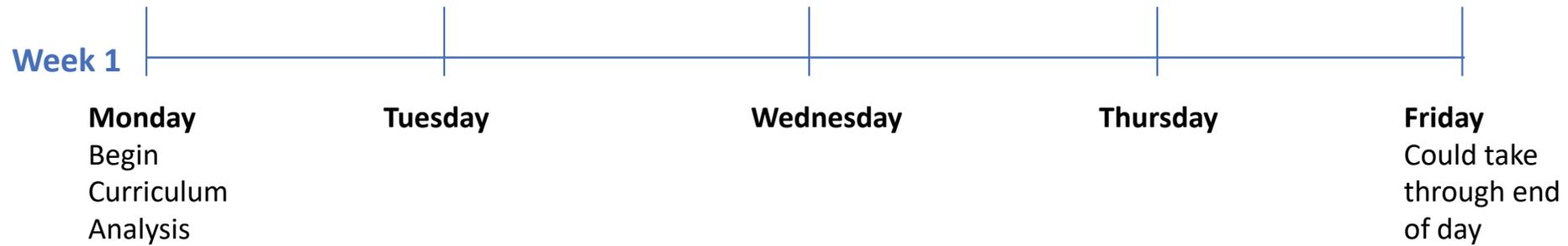
Step 2) Map existing learning

Place a copy of your competency model into the mapping template

Job Title	Competency / Task Category	Skill / Task	Behavioral Example	Required Proficiency	Activity Code	Type	Learning Opportunity Name or Description
Field Services Manager	Communication	Consistently deliver customer-focused presentations	Use a customer-focused approach to presentations	Applied			
Field Services Manager	Communication	Consistently deliver customer-focused presentations	Research the role and background of stakeholders before the presentation o Ask probing, open-ended questions about their needs o Ask "why?" o Talk to peers about stakeholder motivations, needs and requirements	Applied			
Field Services Manager	Communication	Consistently deliver customer-focused presentations	Ensure every presentation has a purpose and delivers value to the recipient(s)	Applied			
Field Services Manager	Communication	Consistently deliver customer-focused presentations	Plan presentations to weave supporting data throughout to support recommendations and timing considerations	Applied			
Field Services Manager	Communication	Consistently deliver customer-focused presentations	Can prepare a concise, motivating and persuasive presentation o Use clear and concise communication (e.g., bullet points, summaries, etc.) o Emotional/inspiring visuals that support my message	Applied			

Resource: Task To Training Mapping Template.xlsx

Step 2) Map existing learning

Map tasks for one competency, one at a time

1. Filter both templates by competency/category (columns O and B in the images)

2. Using first task and examples, look for activity whose learning objectives match task examples for target proficiency

3. Match found? Add match to mapping template

4. Move to next task in competency

Step 2) Map existing learning

Sort your mapping template by Skill/Task, then Activity Type, then Activity Description – this will enable you to review and evaluate the mix of learning opportunities being recommended for each task

Skill/Task	Behavioral Example	Required Proficien	Activity Code	Activity Type	Activity Description
Consistently deliver customer-focused presentations	View	3	SD_PRESENTATION_SKILLS	Classroom	Presentation Skills classroom course
Consistently deliver customer-focused presentations	View	3	MS_PPT_101	eLearning	Using Microsoft PowerPoint eLearning
Consistently deliver customer-focused presentations	View	3	EMI_CUST_FOCUS_PPT	Job Aid	Customer-Focused Presentation Template
Consistently deliver customer-focused presentations	View	3	JA_SD1COMM006	Job Aid	List of activities to consistently deliver customer-focused presentations
Consistently deliver customer-focused presentations	View	3	SD_SKILL_PR_PEROPEX_18	Skill Practice	Customer-Focused Presentations: Prepare and deliver customer-focused presentations that address the needs and motivation of the audience

✿ Try to have a blend of different activity types at the task level for learner preference

✿ Consider activity types relevant to the nuances of your audience

Step 3) Fill gaps

Propose learning opportunity for any gap with activity description, type and learning objective
- The learning objective comes from the behavioral example for which you have a gap

Skill/Task	Behavioral Example	Required Proficiency	Activity Code	Activity Type	Activity Description	Activity Link	Learning Objective
Consistently deliver customer-focused presentations	Use presentation tools (Teleconference tools)	3		Video	Overview and performance support tutorials for using Zoom teleconference		Use teleconference tools
Consistently deliver customer-focused presentations	Use active listening techniques	3		Activity	Meet with someone from whom who you need to gather input. Ask them only open ended questions. As they provide answers, probe for more information, including asking "why" until you have a thorough understanding of what they told you. Then summarize what they told you and ask for confirmation.		Use active listening skills to thoroughly understand a topic/need

Examples of "70" (experiential) activities:
- Sit with someone while they perform [X]. Challenge their rationale and be sure you understand it. Participate in their discussion/validation with others. Make a checklist to document the process they followed, and list the specific [system] changes they made as a result of this particular [piece of information].
- Sit with someone while they prepare the [X]. Ask them to explain what they're doing and why they are doing it, with their best practices. Make a checklist of the steps in the process.
- Sit with someone who is performing [X]. Do what they do. Identify/ask questions. Compare your results to theirs. Document what they do differently. Make a checklist for yourself.
- Shadow someone who has been asked to [X]. Document the request and the steps for completion. Do this for 3 separate requests, preferably of different types.
- Ask 3 internal/external customers how you're doing and how you can improve your service to them. Ask for specifics. On your own, make a list of how you can do good things better and how you can improve. Create an action plan for a short term plan to operationalize this change. Share your action plan with your manager and ask for feedback.
- Build and present a customer-specific business case to my team or an individual for their feedback before delivering it to the customer
- Make a presentation to the team on business model and competitive position in the marketplace
- Brainstorm with your team how to find the best data sources for [X] and how to automate them

Examples of "20" (collaborative) activities:
- As your manager to locate a task-based mentor
- As your manager to assign you as a task-based mentor for others
- Ask a task-based mentor to observe you in a sales meeting and provide feedback

See Competency-Based Learning - Steps To Implement.docx for examples of informal activities you may want to propose

Competency-Based Learning: Fill gaps example

**Task:** Consistently deliver customer-focused presentations

Level 3 Examples	Learning opportunity whose learning objective matches the examples
Use a customer-focused approach to presentations – ensure every presentation has a purpose and delivers value	Presentation Skills classroom course

Research the role and background of stakeholders before the presentation
   o Ask probing, open-ended questions about their needs
   o Ask "why?"
   o Talk to peers about stakeholder motivations, needs, and requirements
	Skill practice: identify the needs and motivations of presentation participants

Use presentation tools (Microsoft PowerPoint, Teleconference tools)	Using Microsoft PowerPoint eLearning

Can prepare a concise, motivating and persuasive presentation
   o Use clear and concise communication (e.g., bullet points, summaries, etc.)
   o Emotional/inspiring visuals that support my message
 	
Plan presentations to weave supporting data throughout to support recommendations and timing considerations
	Build a business case for some change I think should be made in our department, with a focus on supporting data and timing that would influence the decision. Present it to my team and ask if they would agree with my recommendation. Then ask for presentation feedback.

Use active listening techniques	Meet with someone from whom who you need to gather input. Ask them only open ended questions. As they provide answers, probe for more information, including asking "why" until you have a thorough understanding of what they told you. Then summarize what they told you and ask for confirmation.

Competency-Based Learning: Fill gaps activity

Task: Consistently deliver customer-focused presentations

Level 4 Examples	Learning opportunity
Perform thorough research before building any presentation	

Customize communications to the audience
  o Present recommendations to peers tactfully
  o Translate technical to layman's language and vice versa with ease -- speak the audience's language	

Adapt my communication style to the preferences of the audience	

Accommodate different learning styles
  o Present clear, easy-to-understand information orally
  o Support information with examples
  o Use visual aids, graphs	

Use a structured technique for communication preparation
  o Anticipate objections and have a response
  o Plan for contingency	

Interpret non-verbal and verbal cues to alter my messaging	
Achieve influence and impact even when holding a position contrary to the majority	
Use multiple presentation tools and media to maintain audience interest/engagement	
Advise others on tailoring the message to adapt to others' cultures and perspective, especially when communicating with globally diverse audiences	

Adding Structure: Skill Practice With Instructions

Create Informal, Competency-based Learning In Only 1 Day: http://webcasts.td.org/webinar/2642

Found in the materials you can download.

Competency-Based Learning: Learning Curation

Skill/Task	Behavioral Examples	Required Proficiency	Activity Code	Activity Type	Activity Description	Activity Link	Learning Objective
Manage time efficiently such that I consistently adhere to commitments and changing priorities	View	3	EMI_TED1	Video	Humorous TED talk that explains how to better manage your time and avoid bad meetings	View	• Avoid meetings that are not well structured. • Promote better meeting organization among peers.
Manage time efficiently such that I consistently adhere to commitments and changing priorities	View	3	JA_SD1PERMG004	Job Aid	List of activities to establish and reinforce a strong focus on internal/external customer satisfaction	View	Manage time efficiently such that I consistently adhere to commitments and changing priorities
Manage time efficiently such that I consistently adhere to commitments and changing priorities	View	3	EMI_PROFESSIONAL_PRESENCE_ILT_04	Classroom	Professional Presence: Time Management	View	• Explain how to address the needs of multiple customers.
Manage time efficiently such that I consistently adhere to commitments and changing priorities	View	3	SD_SKILL_PR_PEROPEX_01	Skill Practice	Task List: Use a structured process to differentiate, prioritize, and complete high value tasks	View	Create a personal project plan to consistently achieve daily operational excellence by prioritizing and completing high value tasks
Manage time efficiently such that I consistently adhere to commitments and changing priorities	View	3	HMM-TIME-MGMT	eLearning	Harvard Manage Mentor: Time Management	View	• Analyze how you currently spend your time. • Identify opportunities for improvement. • Set goals. • Prioritize tasks. • Plan your time efficiently using scheduling tools. • Control time-wasters. • Evaluate

✱ See TD Magazine for ideas on Learning Curation

✱ It can be as easy as going to YouTube, TEDx, Khan Academy, or relevant associations or government sites and searching for a behavioral example

Competency-Based Learning Timeframe

*Assuming Curriculum Analysis takes 5 days & mapping takes 3 days*

Week 1

Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
Begin Curriculum Analysis				Could take through end of day

Week 2

Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
Prepare mapping template Mapping / fill gaps	Mapping / fill gaps	Mapping / fill gaps	Finish mapping / fill gaps if needed	
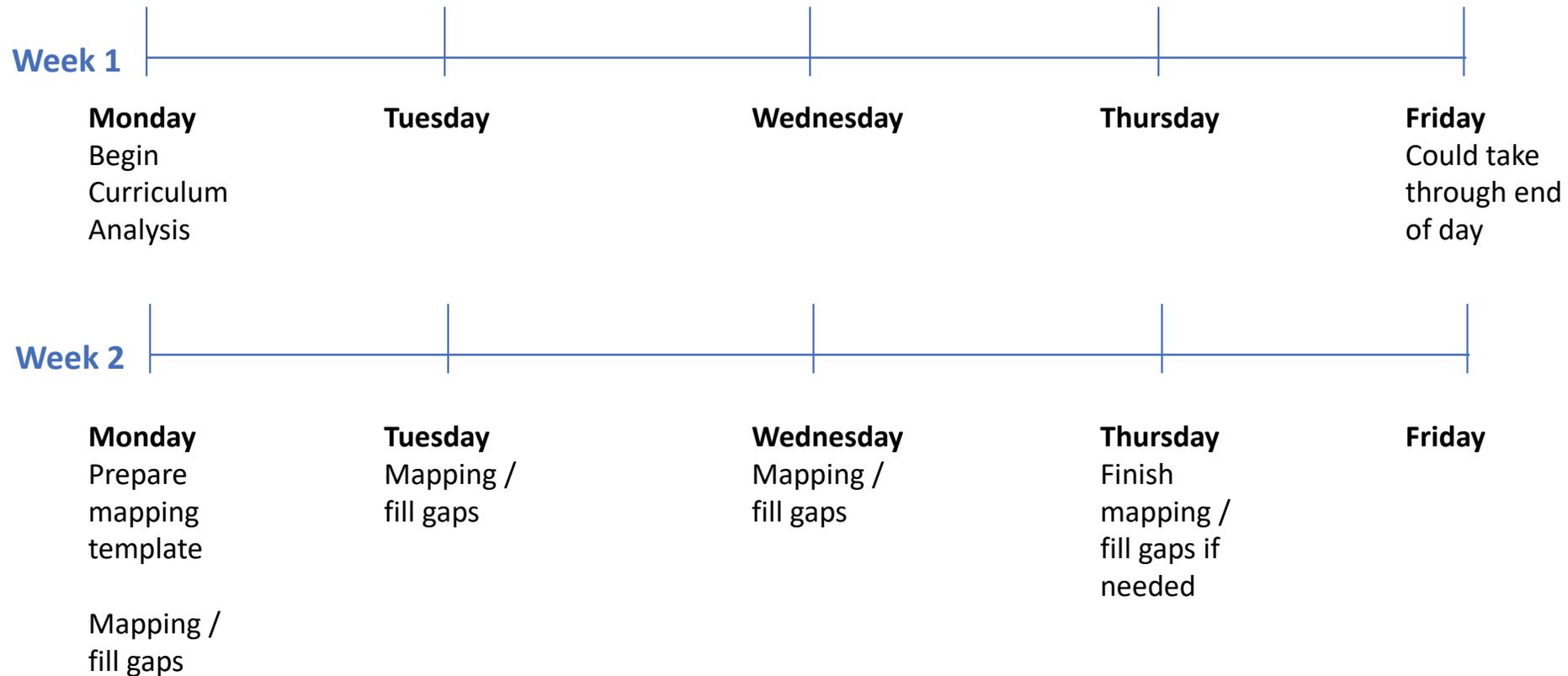
Competency-Based Learning Timeframe

The competency model for each role defines the skills required to accomplish their part of corporate strategy

You know what learning opportunities (built or proposed) someone with a skill gap can leverage to close that gap

Know the demand for what you don't have BEFORE you build/buy it
(Competency assessment like https://td.org/skilltracker)

Provide Competency-Based Learning to each person to accelerate learning transfer

Keep your mapping current

The skills and behaviors in your model will change
- Usually updated annually or due to major changes
- Mapping can be reviewed via pre-work with 4-6 high performers and recommended updates consolidated during 1-2 hour meeting

Learning opportunities are updated
- Changes to learning opportunities should now be driven by the competencies themselves, so the mapping should be updated before the learning opportunities
- If you don't own an opportunity being modified, verify learning objectives still link
- **If curating learning, curation and mapping occur simultaneously**

Competency Management Tool

Keep your mapping current

Crowdsource: Actively solicit feedback for continuous improvement

Use automated workflow to keep them current

Click here if you have ideas for improving this skill practice. We'd love to hear them!

Summary

* You learned how to link competency models to existing learning opportunities, how to identify learning activities to fill gaps, and how to keep your mapping current

* You can't accelerate learning transfer unless you have relevance and employee buy-in
  * Starts with competency model
  * Ends with competency-based learning

* If you have learning opportunities that are not tied to your competency model, they are wasting your time and valuable resources

* The most important thing you can do is to ensure that your audience has the skills they need to execute their part of corporate strategy – "competency-based learning"

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Download materials from this webinar: http://ow.ly/QgxC30kTOHx

Link to ATD Skill Tracker

Link to Competency Models For Professional Development LinkedIn Group

Link to white paper: Why employees taking charge of their learning is good for you

Link to other webinars