How To Accelerate Learning Transfer Through Competency-Based Learning

Presented By:
Cheryl Lasse, SkillDirector
Webcast Objectives

In this webinar you will learn:

- How to link competency models to existing learning opportunities
- How to use competency models to identify learning opportunities you need to develop
- How to keep your mapping current
Competency Models

All about competency models / standard models:
http://skilldirector.com/competency-models

The value of competency models:

How to use competency models:

WEBINAR: How to create a competency model:
Competency Models

LinkedIn Group where I can answer your questions
https://www.linkedin.com/groups/8467576
Competency Models

CEO

COO

R&D  Manufacturing  Distribution  Sales  Marketing  Service
Competency Models

The competency model for each role defines the skills required to accomplish the strategy.

How can you develop what your audience needs if you don’t know what skills they should have?
Competency Models

RSA ANIMATE: Drive: The surprising truth about what m...

Dan Pink: Drive
A competency model describes what it looks like to be great in your role.
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...

...in order to execute the annual operating plan...

...so you can be proactive instead of reactive
## Competency Models

**Consistently deliver customer-focused presentations**

*Critical to success*

<table>
<thead>
<tr>
<th>Rating</th>
<th>Behavioral Examples</th>
</tr>
</thead>
</table>
| 5 - Expert | • Build templates and tools for enabling customer-focused presentations, capturing the motivation, needs and requirements of stakeholders  
  o Stakeholder profiles  
  o Lists of discovery questions  
  o Anticipate objections and proactively overcome them with data before the objection arises  
  o Craft a persuasive argument on-the-fly to neutralize dissenters  
  o Display skilled behaviors |
| 4 - Skilled | • Use a structured technique for enabling customer-focused communication  
  o Use discovery question lists  
  o Document profiles of each stakeholder, and update them as new insight is obtained  
  o Perform thorough research before building any presentation  
  o Anticipate objections  
  o Often able to sway others to a strategy that may have higher short term costs but more long term benefits  
  o Coach others on how to prepare and deliver customer-focused presentations  
  o Display applied knowledge behaviors |
| 3 - Applied Knowledge | • Use a customer-focused approach to 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  
  • Ensure every presentation has a purpose and delivers value to the recipient(s)  
  • Plan presentations to weave supporting data throughout to support recommendations and timing considerations  
  • 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 |
| 2 - General Awareness | • Use the proper grammar and spelling in presentations  
  • Proof my work before delivering  
  • Can prepare a complete, logical presentation  
  • Gather appropriate supporting data  
  o Have supporting available should the need arise – it’s presented as support |
| 1 - Limited Awareness | • Focus on the speed of preparing a presentation, more than the quality  
  • Am great at “winging it” – can deliver a presentation, state my position, or write others without much preparation |

**What is a competency?**

Steps we’ll cover

1. What it means to map competencies to learning
2. The steps to map competencies to learning
3. Filling gaps
4. Keeping your mapping current
What it means to map competencies to learning

~70% Experience
(on the job, skill practices, job aids, templates)

~20% Exposure
(social learning, coaching, mentoring and feedback)

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

Framework developed by the Center for Creative Leadership (CCL)
What it means to map competencies to learning

Competency

Task

Task

Task
# What it means to map competencies to learning

## Consistently deliver customer-focused presentations

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What it means to map competencies to learning

Consistently deliver customer-focused presentations

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What it means to map competencies to learning

<table>
<thead>
<tr>
<th>Behavioral Example</th>
<th>Learning Opportunity / Learning Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Use a customer-focused approach to presentations</td>
<td>Customer Focus course</td>
</tr>
<tr>
<td>• Research the role and background of stakeholders before the presentation</td>
<td></td>
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<td>Creating Effective Presentations course</td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

For more on this, see “Driving Targeted and Robust Development”. TD Magazine. December 2015. Harris and Terry.
What it means to map competencies to learning

**Example Skill Practice**

**Learning Objectives:**
- Identify the needs and motivation of presentation participants
- Ensure every presentation has a purpose and delivers value to the recipient(s)

**Instructions:**
For this activity, you should pick some presentation that either you have to give, or a peer will be giving. Identify the topic and the purpose (what you/peer want to happen as a result of the presentation).

<table>
<thead>
<tr>
<th>Presentation Topic</th>
<th>Presentation Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendee (Name &amp; Titles)</td>
<td></td>
</tr>
</tbody>
</table>

Step 1) Make a list of the questions you'd want to know about their motivations, needs and requirements in order to ensure you can accomplish the purpose. Be sure they are probing, open ended questions, and that you ask "Why?" if their answer requires more depth.

**Question 1**

**Question 2**

**Question 3**

**Question 4**

**Question 5**

Step 2) Make a copy of the template for each attendee. If you have 5 attendees, you'll have 5 templates.

Step 3) Do your homework. Using any company resources, LinkedIn profiles and your peers who have a relationship with this person, try to get the answers to the questions you’ve written. Use the template below to capture the details. Be sure to identify the source.

Step 4) Schedule 15 minutes with each of the attendees (one-on-one or virtually) and ask them the questions – your homework should help you to be able to understand their position. Use the template below to capture the details from your conversation. It may not be possible to meet with each person.

Step 5) Identify how you will tailor your presentation (or your peer should be tailoring their presentation) in order to achieve your purpose based on what you learned about the participants. Use the template below to capture your plans.

Note that you won’t necessarily use this template the same way for all presentations, but it can serve as a good reminder for consistent presentation preparation, and to ensure that you capture the voice of your presentation customers.

**Example Skill Practice**

**TEMPLATE**

**Attendee:** John Smith, VP of Sales

**Homework:**

<table>
<thead>
<tr>
<th>Source</th>
<th>What I learned</th>
</tr>
</thead>
<tbody>
<tr>
<td>LinkedIn</td>
<td>Says goal is XXX</td>
</tr>
<tr>
<td>Mary Brown</td>
<td>Says focused on YYY</td>
</tr>
</tbody>
</table>

**Conversation answers:**

**Question 1**

**Question 2**

**Question 3**

**Question 4**

**Question 5**

**How I will tailor the presentation**

Be sure to include an overview on how this project will impact John’s supply chain project and how it will integrate with his timeline, adding value to his project, as opposed to detracting from it.

Image of a sample skill practice, found in the materials you can download.
What it means to map competencies to learning

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<tr>
<th>Behavioral Example</th>
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<tbody>
<tr>
<td>• Use a customer-focused approach to presentations</td>
<td>Customer Focus course</td>
</tr>
<tr>
<td>• Research the role and background of stakeholders before the presentation</td>
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<tr>
<td>o Ask probing, open-ended questions about their needs</td>
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<tr>
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</tr>
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<td></td>
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</tbody>
</table>
What it means to map competencies to learning

**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

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

Develop or Buy learning opportunities that don’t support skills people need to have – WASTE!

Don’t have learning opportunities that enable people to close skill gaps

Make it likely that someone who has 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

Risk people will get frustrated with the inability to do their jobs, and will leave
The steps to map competencies to learning

1. Identify your learning opportunities and assets
2. Prepare your mapping template
3. Map your activities
Identify your learning opportunities and assets

Familiarize

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Competency / Task Category</th>
<th>Skill / Task</th>
<th>Behavioral Example</th>
<th>Required Proficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Services Manager</td>
<td>Communication</td>
<td>Consistently deliver customer-focused presentations</td>
<td>Use a customer-focused approach to presentations</td>
<td>Applied</td>
</tr>
<tr>
<td>Field Services Manager</td>
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</tr>
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</tr>
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Search
Identify your learning opportunities and assets

Learning curation articles can be found in January’s TD Magazine:

https://www.td.org/Publications/Magazines/TD/TD-Archive/2016/01/Cultivating-Valuable-Learning-Environments

https://www.td.org/Publications/Magazines/TD/TD-Archive/2016/01/Diamond-in-the-Rough

A good Learning Curator selects **only the best** items to share with others.

A good Learning Curator has specific criteria for selection based on skill, role, and proficiency required.
Identify your learning opportunities and assets

Put identified items in the template

Learning objectives are key to the mapping process

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Curriculum Analysis</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td><strong>Curriculum Analysis</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Activity Code</td>
<td>Type (e.g., classroom, cLearning, webinar, job aid, template video, checklist)</td>
<td>Training Activity Name/Description</td>
<td>Link To Activity, Asset, or person (regardless of where it is located)</td>
</tr>
<tr>
<td>5</td>
<td>HMCMM_001</td>
<td>Classroom</td>
<td>How My Customer Makes Money</td>
<td>[link to LMS signup page]</td>
</tr>
<tr>
<td>6</td>
<td>Template_001</td>
<td>Template</td>
<td>Presentation needs analysis template</td>
<td></td>
</tr>
</tbody>
</table>

**Resource:** *Curriculum Analysis Template.xlsx*

Categorize for easy mapping
Competency-Based Learning Timeframe

Unless you have no content

Wk 1

Monday
Begin Curriculum Analysis

Tuesday

Wednesday

Thursday

Friday
Could take through end of day
Prepare your mapping template

Place a copy of your competency model into the mapping template

<table>
<thead>
<tr>
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<td></td>
<td></td>
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</table>

Resource: Task To Training Mapping Template.xlsx
Competency-Based Learning Timeframe

Assuming Curriculum Analysis takes 5 days

Wk 1
Monday: Begin Curriculum Analysis
Tuesday: 
Wednesday: 
Thursday: 
Friday: Could take through end of day

Wk 2
Monday: Prepare mapping template
Tuesday: 
Wednesday: 
Thursday: 
Friday: 
Map your activities

Map tasks for one competency, one at a time

Resource/Tips & Tricks: Competency-Based Learning - Steps To Implement.docx
### Filling gaps

Propose learning opportunity for any gap with type and learning objective

<table>
<thead>
<tr>
<th>Job Title</th>
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<th>Behavioral Exam</th>
<th>Required Proficiency</th>
<th>Activity Code</th>
<th>Type</th>
<th>Learning Opportunity Name or Description</th>
<th>Learning Objectives</th>
</tr>
</thead>
<tbody>
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<td>Applied</td>
<td>SD_CUST_FOCUS</td>
<td>Classroom</td>
<td>Customer Focus course</td>
<td>Use a customer-focused approach to communications</td>
</tr>
</tbody>
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| Field Services Manager | Communication               | Consistently deliver customer-focused presentations | Plan presentations to weave supporting data throughout to support recommendations and timing considerations | Applied              | SP_002        | Skill Practice |                                    | Weave supporting data throughout a presentation to support recommendations and timing considerations |

**Resource/Tips & Tricks:** Competency-Based Learning - Steps To Implement.docx
Competency-Based Learning Timeframe

Assuming Curriculum Analysis takes 5 days & mapping takes 3 days

**Wk 1**

**Monday**
Begin Curriculum Analysis

**Tuesday**

**Wednesday**

**Thursday**

**Friday**
Could take through end of day

**Wk 2**

**Monday**
Prepare mapping template

**Tuesday**
Mapping / fill gaps

**Wednesday**
Mapping / fill gaps

**Thursday**
Finish mapping / fill gaps if needed

**Friday**
Competency-Based Learning Deliverables

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.
# Competency Assessment Tool

<table>
<thead>
<tr>
<th>Category</th>
<th>Task/Skill</th>
<th>Limited Awareness</th>
<th>General Awareness</th>
<th>Applied Knowledge</th>
<th>Skilled</th>
<th>Expert</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aligning To Customers</td>
<td>Build trust through a customer-focused approach and advocacy</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Building A Business Case</td>
<td>Identify clearly the business and financial benefits of a solution in a</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td></td>
<td>way that speaks to business impact</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Communicating Effectively</td>
<td>Demonstrate well prepared verbal and written communication and presentation techniques</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Communicating Effectively</td>
<td>Demonstrate timely responses to all inquiries for information within the requested amount of time</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Creating And Closing Opportunities</td>
<td>Research and target prospects</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Creating And Closing Opportunities</td>
<td>Conduct interest-building calls (cold calls) when applicable</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Creating And Closing Opportunities</td>
<td>Identify sales leads</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Creating And Closing Opportunities</td>
<td>Follow up/manages sales leads</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
</tbody>
</table>
## Personalized Learning Plan

### Assessment Results: Personalized Learning Plan

Here you can see the automatically generated recommendations that can close your skill gaps. Printing or exporting the list will display additional information.

Select 1-3 skill gaps to close first. Filter by each selected gap, then select an activity by placing a check in the On Development Plan column. When all activities have been selected, click Submit.

**Report Criteria**
- Employee Assessment Date: 1/19/2016
- Manager Assessment Date: 1/19/2016

<table>
<thead>
<tr>
<th>Priority</th>
<th>Task/Skill</th>
<th>Activity Description</th>
<th>On Development Plan?</th>
<th>Target Completion Date</th>
<th>Completed?</th>
<th>Activity Type</th>
<th>Activity Link</th>
<th>Status</th>
<th>Hrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Quality opportunities</td>
<td>Spend an hour listening to Inside Sales make calls</td>
<td>□</td>
<td></td>
<td>□</td>
<td>Activity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Quality opportunities</td>
<td>Opportunity Sales Planning (eLearning): Opportunity Analysis</td>
<td>□</td>
<td></td>
<td>□</td>
<td>eLearning</td>
<td>view</td>
<td>Active</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Quality opportunities</td>
<td>Opportunity Sales Planning (ET): Opportunity Analysis</td>
<td>□</td>
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<td>□</td>
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<td>2</td>
<td>Quality opportunities</td>
<td>Opportunity Analysis Notes</td>
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<td>Job Aid</td>
<td>view</td>
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Keeping 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
Summary

- 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”
- You learned how to link competency models to existing learning opportunities, how to identify curriculum gaps, and how to keep your mapping current
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Link to download notes & templates:  http://ow.ly/Xq4YL

Link to Competency Models For Professional Development LinkedIn Group for questions:  https://www.linkedin.com/groups/8467576