APPLY SYNERGIES
& 5 MOMENTS OF NEED

EnABLE

THE 5 MOMENTS OF NEED INSTRUCTIONAL SYSTEMS DESIGN METHODOLOGY

Introduction

When it comes to instructional design, most corporate learning programs still focus on knowledge rather than performance. Although gaining and retaining knowledge is an appropriate primary focus in academic institutions, the real world of work calls for a performance-first approach to Instructional Systems Design (ISD) where knowledge requirements are driven by what people need to do. With that in mind, we have spent the last four decades evolving traditional ISD practices into a performance-based instructional design methodology that we call EnABLE.

EnABLE is the 5 Moments of Need instructional systems design methodology that empowers L&D groups to be the strategic partners their organizations require to adapt, to learn, and to perform ahead of change.

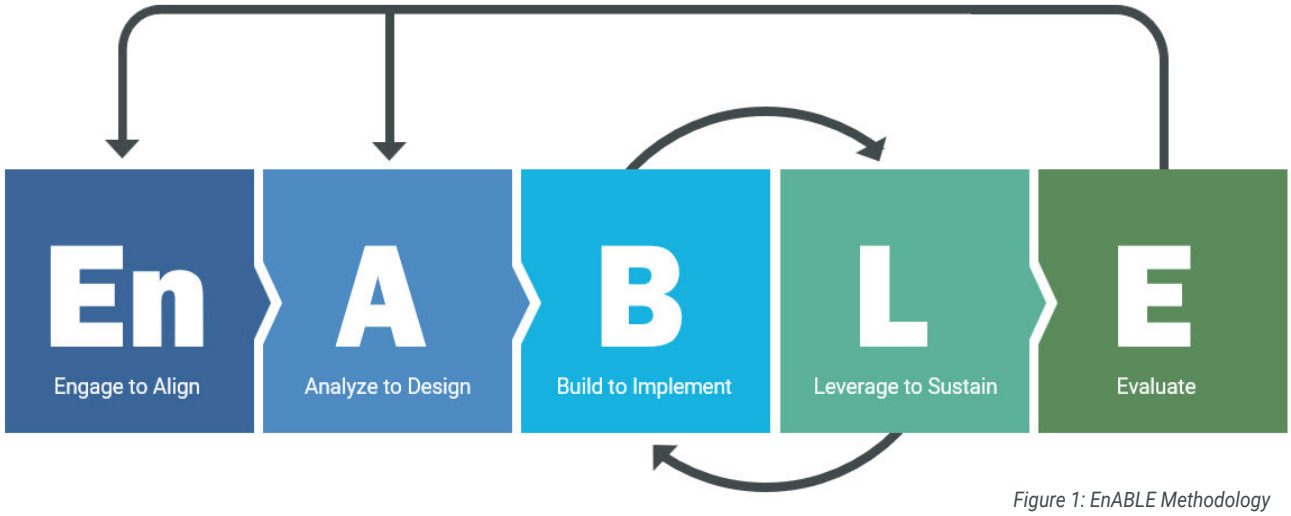


Figure 1: EnABLE Methodology

EnABLE Performs the Following Functions:

- **Addresses the continuously evolving performance needs of the organization.** Stewards within the learning function must tune in to market movements and trends and develop a shared responsibility with leadership for the performance challenges and opportunities they face. The learning function must demonstrate capacity to rapidly provide solutions that deliver timely, measurable performance improvement within the workflow. This focus on evolving performance is much different from what happens in most organizations today.

- **Supports all 5 Moments of Need.** There are five fundamental moments that comprise the full spectrum of learning and performance support requirements. Learning solutions designed around these 5 Moments of Need provide an overarching framework for helping employees become and remain competent in their individual and collective work. Specifically, the 5 Moments of Need are:

Figure 2: 5 Moments of Need

- **Applies agile principles and values to instructional design practices**. An organization cannot be adaptive if its L&D practices are lethargic, time-consuming, and costly. To become more adaptive, some learning teams embrace agile project management methods associated with agile software development efforts. Although agile project management practices can help, they aren't enough. L&D teams must also streamline their analysis, design, and development practices by consolidating them, removing redundancies, and embracing more rapid, iterative approaches. These agile practices must be highly structured but adaptable through the application of governing principles and defensible decision trees.

- **Continuously optimizes solutions by leveraging people, processes, and technology.** Extending learning and support into the workflow requires L&D teams to forge more direct working partnership with the business. This is absolutely necessary because deliverables that support performance in the workflow must be kept current. This is the most significant methodology challenge there is. Keeping solutions current requires developing capabilities in two areas: 1) keeping content and resources within the solutions current and 2) keeping the functionality of those solutions relevant to the changing needs of the organization.

  These ongoing processes can become labor- and time-intensive unless they are clearly defined and automated as much as possible. But definition and automation are not uncharted territory. L&D groups have long-term experience with cost-effective access to learning content management technologies. Process management technologies and practices are in place in most L&D groups. Best of all, embedded performance support systems (EPSSs) are now available with capabilities that can help leverage these and other technologies to continuously optimize solutions, keeping them current and relevant.

- **Enables ongoing performance measurement.** Performance measurement is not a "nice to have". It is a critical part of an organization's ability to respond to change. As Peter Drucker and others have said, "What gets measured gets done. Make sure you are measuring the right things!"[1] Work performance can be measured through an EPSS and those measurements can be tied directly to bottom-line results. Said another way, the EPSS enables business leaders to see the value of measuring work results in the "performance zone", plus how those results affect business profitability. They will quickly understand that the organization can reinforce right performance by measuring the right things.

- **Establishes a true partnership with the business.** For many organizations, L&D is viewed primarily as a service provider rather than a true business partner that delivers strategic benefit. In a traditional approach to learning, employees stop their work and step onto L&D's "turf"–classrooms and LMSs–to gain access to eLearning, video learning, or a

1 The origin of this saying may go clear back to the 1500s and has been attributed to Drucker, Tom Peters, Henry Ford, Lord Kelvin, and others.

virtual course. This relationship changes dramatically when L&D extends its reach into the workflow with 5 Moments of Need solutions. Because L&D doesn't "own" the workflow, L&D must partner with the business more closely to determine, plan, develop, and maintain these more comprehensive, "business-impactful" solutions. The fact that these solutions allow continuous data gathering provides L&D with a way to verify legitimate business value that it adds to the organization.

EnABLE is the instructional systems design methodology that makes it possible for organizations to gain and sustain effective performance in the workflow, which is crucial in today's environment of dynamically changing market forces. The EnABLE ISD methodology has been developed, iterated, and proven effective through direct project work within many hundreds of companies over the past thirty-five years. At its foundation, EnABLE incorporates applied research from cognitive, behavioral, and experiential learning theory. It is systematic and agile as well as a significant and necessary adjustment to the traditional ADDIE approach.

ADDIE vs. EnABLE

If the term "instructional systems design" (ISD) is giving you pause, allow us to explain how it slightly differs from plain old instructional design. ISD emphasizes an instructional system. This system blends modalities and technical component parts that operate together to accomplish measurable outcomes. This is a more complete concept of how we envision learning being designed vs. the more abbreviated instructional design, which is missing the critical delineation of a system.

With that clarification in mind, for the most part, ADDIE ISD methodologies are rooted in and fundamentally shaped by applied cognitive and behavioral psychology research. ADDIE's foundation includes current ISD theory from Gagne, Briggs, Bloom, Mager, Merrill, Dick, and Carey. Within instructional testing and evaluation, Glaser, Shriven, Stufflebeam, Stake, and Kirkpatrick particularly enriched this early thinking.

As these remarkable ISD pioneers were laying the theoretical foundations for what has become ADDIE, another body of equally remarkable researchers approached learning from a very different paradigm. Their work resulted in the development of experiential learning theory. Their research has had limited influence on traditional instructional design approaches, like ADDIE, but for anyone responsible for workplace skill development, designing for experiential learning is a necessity.

In 1938, John Dewey, a proponent of experiential learning, wrote:

"… Every experience both takes up something from those [experiences] which have gone before and modifies in some way the quality of those [experiences] which come after.… As an individual passes from one situation to another, his world, his environment, expands or contracts.… What he has learned in the way of knowledge and skill in one situation becomes an instrument of understanding and dealing effectively with the situations which follow. The process goes on as long as life and learning continue."[2]

Here's why experiential learning research is important. The journey to becoming a skilled physician looks something like the illustration in Figure 3.

2 *Experiential Learning: Experience as The Source of Learning and Development* by David A. Kolb

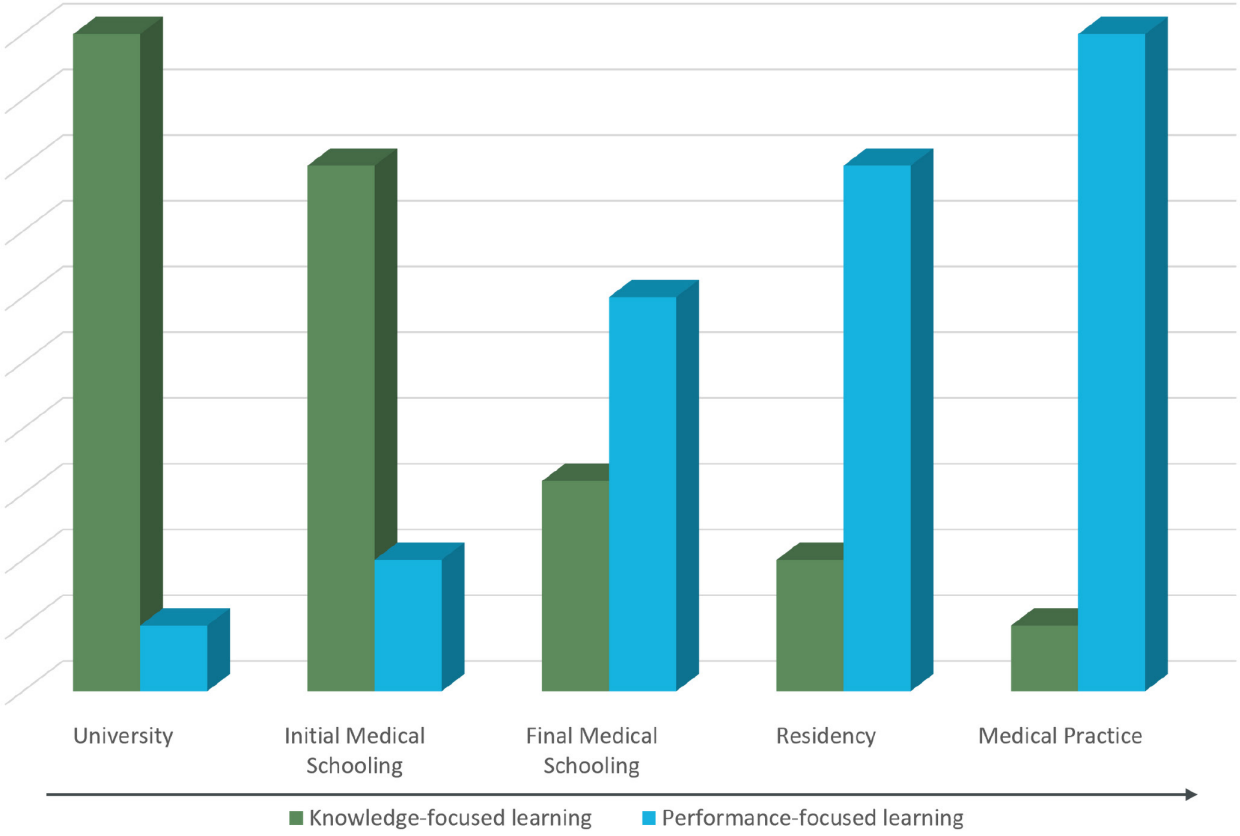


Figure 3: The Learning Shift

Clearly, physicians need formal instruction (the green bars in the illustration) to develop foundational knowledge in many areas before providing direct patient medical care. But it is at the bedside of patients where physicians gain the experience needed (the blue bars) to become competent. Obviously, remaining competent requires continuously stepping away from the care of patients to keep current with exponentially expanding knowledge. But this ongoing learning effort is guided and influenced by the context of experiences in their medical practices.

The distinction in this example between cognitive/behavioral (knowledge-focused) and experiential (performance-focused) learning is crucial for organizations intent on developing and sustaining a competent workforce. Scrutiny of cognitive and behavioral learning theory reveals a strong bias towards knowledge-focused learning. The bias is clearly acceptable and understandable when addressing the learning requirements within academic environments. But this focus must shift to performance when learning workplace skills, processes, and tasks (principle- and procedural-based).

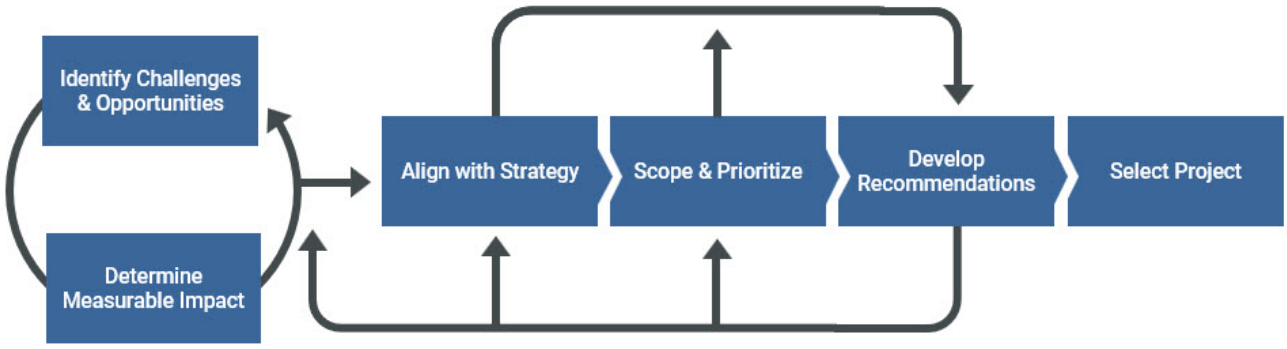
Experiential Learning Research (ELR) provides additional insights and crucial balance needed for a performance-based approach. ELR broadens the reach of instruction to include all 5 Moments of Need in the workflow. As Table 1 illustrates, both knowledge-focused and performance-focused perspectives have a role in organizational learning. But ADDIE methodology is disproportionately knowledge focused and typically addresses a narrower range of learning moments in ISD. Table 1 compares the two mindsets.

ADDIE Mindset	EnABLE Mindset
Approaches training as the primary means for achieving effective on-the-job performance.	Approaches training as just one of the means for achieving effective on-the-job performance.
Primary focus is developing learning solutions.	Primary focus is developing performance solutions.
Training is the default solution when there is a performance gap.	By default, EnABLE checks to see if effective performance can be achieved without pulling people away from their work.
Approaches ISD through the lens of designing, producing, and implementing courseware that is aligned with the business needs of the organization.	Approaches ISD through the lens of designing, producing, and implementing solutions that drive effective performance at every changing moment.

Table 1: Comparison of ADDIE & EnABLE Mindsets

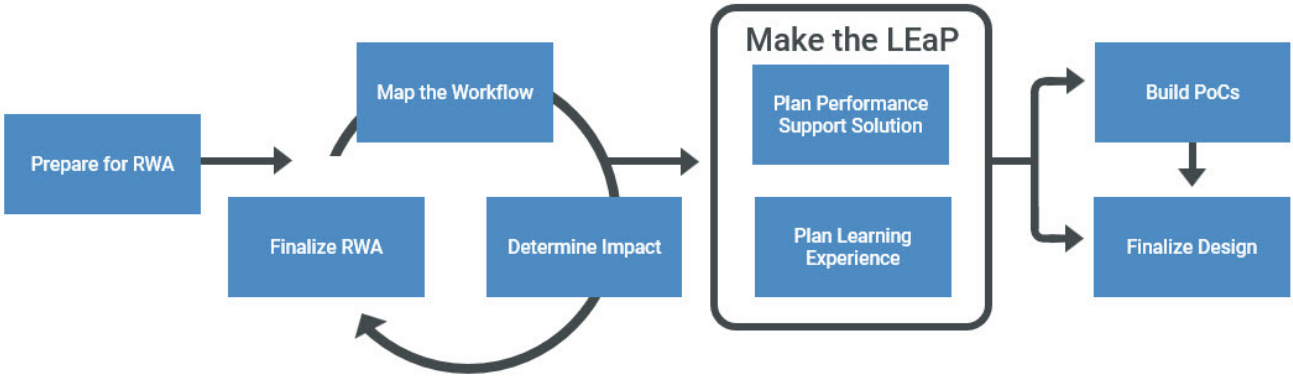
The EnABLE ISD methodology is a blend of theories and practices from both experiential and cognitive/behavioral research. It embraces and honors the foundations of ADDIE but addresses the broader performance-focused requirements of organizational learning. The graphics on the following pages provide a high-level description of the broader methodology.

Engage to Align



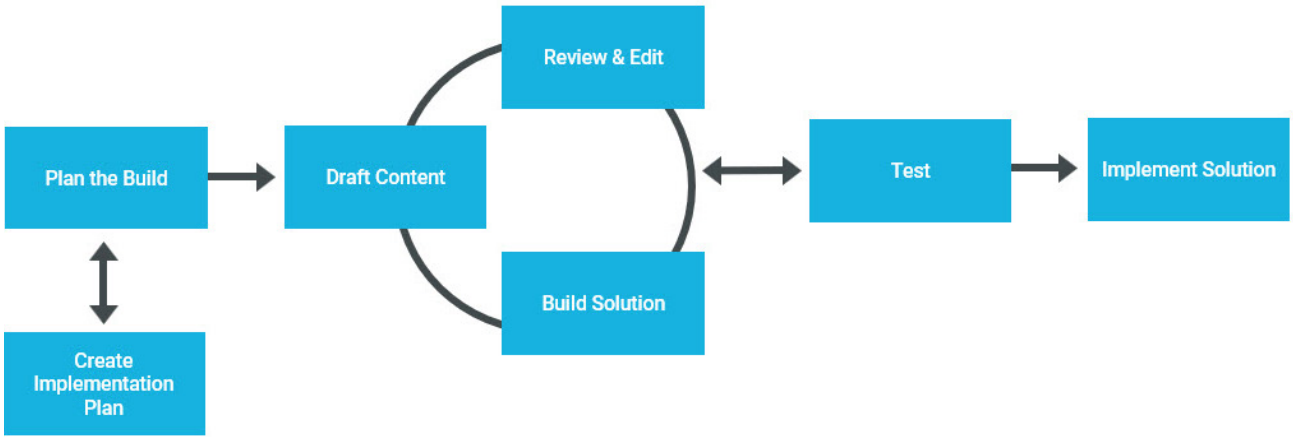
The **Engage to Align** process focuses on identifying performance and measurable business impact requirements of the business rather than instructional needs. These requirements are scoped and prioritized.

Analyze to Design



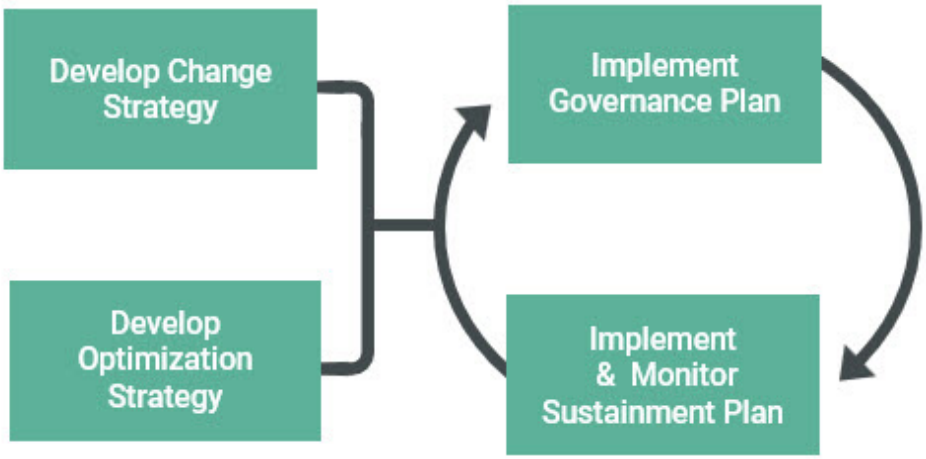
Analyze to Design differs from traditional ADDIE practices in that design efforts occur simultaneously with analysis. The specific tasks within this process are rapid, systematic, and workflow centric. They embrace experiential as well as cognitive and behavioral learning theories. The primary deliverable in this process is a detailed “Learning Experience and Performance” (LEaP) blueprint for building out the 5 Moments of Need solution.

Build to Implement



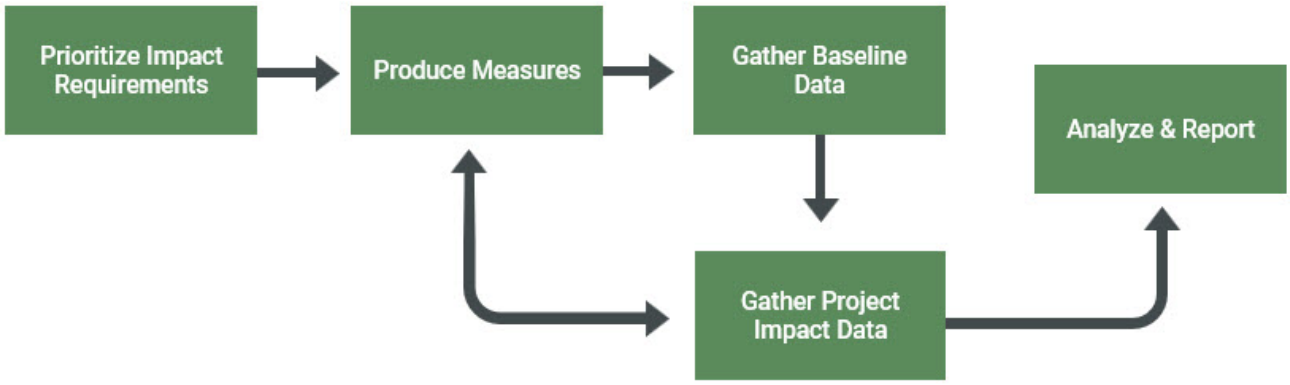
Build to Implement is an iterative process that delivers solutions quickly and then enhances those solutions until they are fully developed.

Leverage to Sustain



Leverage to Sustain enlists people, processes, and technology to keep the solution current.

Evaluate to Implement



Evaluate to Implement engages the capabilities of a workflow learning infrastructure in gathering data from the workflow to help determine the ongoing business impact of the solution.

EnABLE = Faster Competency

The EnABLE methodology dramatically reduces time to competency by providing a workflow learning infrastructure. This infrastructure provides immediate, intuitive, tailored aid to performers, at their moments of need, to ensure the most effective performance. The infrastructure shows its complete value once learners reach the "Sustain" stage of learning. See Figure 4 below.

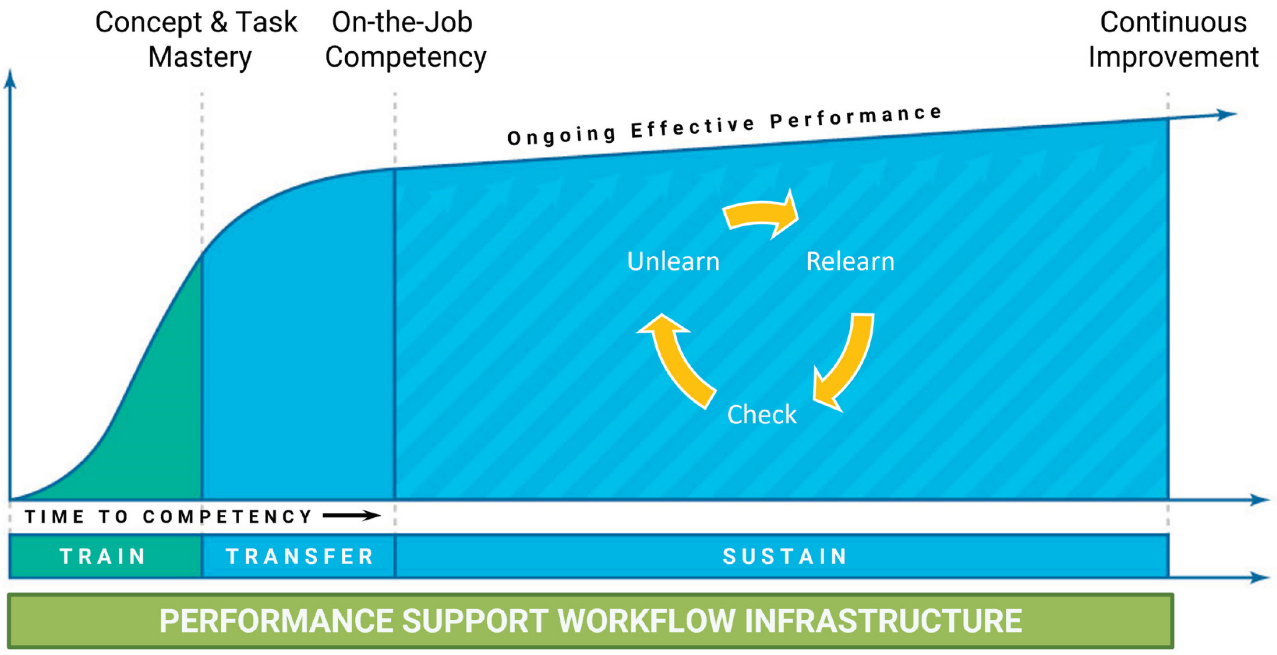


Figure 4: Performance Support Workflow Infrastructure

Sustain is where the real work of learning occurs in the workflow. During Sustain, learners must not only keep their skill sets up to date, but they must also continuously improve upon them. They must check when skills need to change, unlearn (forget and/or override) what's outdated, and then re-learn (replace and adjust) their skills to keep them current.

Continuous improvement requires learning more whenever skill development opportunities occur, and time permits. Learners must be able to recognize and prioritize their own skill gaps. They also require access to just what's needed to help them rapidly close those gaps over time in the context of their workflow. With the right workflow learning infrastructure in place, employees have the support they need to keep current and to improve in the most efficient ways possible. As they move more quickly through the Train and Transfer stages,

they also free up more time and energy to make innovative contributions to the organization's work during Sustain.

The core mission of every L&D team should be to develop solutions that address all 5 Moments of Need across all three stages of learning (Train, Transfer, and Sustain). This mission cannot happen consistently without an ISD methodology that facilitates the rapid development, implementation, and optimization of these broader learning solutions. EnABLE is that methodology.

EnABLE Guides Development of Digital Coach (EPSS) Capabilities

An effective workflow learning infrastructure provides moment-of-need support that is:

- **Deeply embedded.** Employees must have immediate access to their workflow learning solutions whenever they need them, wherever they are, with a minimum amount of effort.

- **Contextually accessible.** Once employees gain access to the workflow learning solution, they must be able to access specific support information and associated resources within two clicks. They must also have different access options based on various work context, like where they are in their workflow, different job roles, timeline requirements, and/or work location(s).

- **Immediately actionable.** At the moment of Apply, employees generally need 2-click/10-second access to steps for a specific task for it to be immediately actionable. From those steps, they require intuitive access to the specific information needed in all supporting resources associated with that task, regardless of where those resources may be located. Although there are exceptions to this requirement, a workflow learning infrastructure must be able to provide immediate performance support, so the performer is not slowed down.

In her 1991 foundational work *Electronic Performance Support Systems: How and why to remake the workplace through the strategic application of technology*, Gloria Gery defines an EPSS with several proposed attributes. Inherent in the EnABLE methodology is specific guidance for developing a Digital Coach (EPSS) that embodies all of them. The following table provides Gery's definition with added explanation in the right column.

Gery's Definition	Explanation
An orchestrated set of **technology-enabled services**	An EPSS provides the most comprehensive level of performance support. This requires software to orchestrate services such as accessing, monitoring, adapting, connecting, recommending, pushing, measuring, and reporting.
that provide **on-demand access**	Today, people work while on the move. Regardless of where they are physically, they need on-demand access to performance support. It needs to be instantly accessible no matter where a performer is within the workflow. Performers are impatient when they stand at the threshold of the moment of Apply. They won't take time to search for an answer. This continues to hold true after accessing an EPSS. They have neither the time nor disposition to scour through endless hits offered up by search engines, wander through websites, or dive down into a learning management system to find and then plow through an eLearning module to get to just the information needed.
to **integrated information, guidance, advice, assistance, training, and tools**	Today's technology must provide 2-click/10-second access to just enough information, guidance, advice, assistance, training, and tools to allow performers to immediately get the job done. The technology must offer up these resources contextually through cascading levels of support that address all 5 Moments of Need. Consider the performance support pyramid in Figure 6 on page 18. It reveals an integration strategy that anticipates the evolving information requirements of a performer. This layered approach is the path for intuitive, fingertip access to the specific resources needed. It takes technology to enable this pyramid. When properly enabled, the pyramid facilitates rapid access to just enough of what's needed. It reins in the chaos of resources scattered across SharePoint sites, locked within an LMS, buried deep in a knowledge repository, stored on someone's desktop, or hidden in someone's mind.

to enable **high-level job performance**	The core mission of our work is to enable high-level job performance, and to ensure that people perform effectively and efficiently at every changing moment of their work. Figure 6 on page 18 illustrates this crucial concept in the journey from learning to competency. Training alone cannot and will not meet this need.
with **minimum support from other people**	Although there may be times when pulling people away from their work to provide support is justifiable, it is an expensive proposition, especially when it is the default option. An effective EPSS will enable self-reliant, high-level learning before it enables support from other people. Self-support is the best option, with the possible exception of highly critical, complex skills. You can judge the effectiveness of an EPSS by Gery's standard: its ability to "enable high-level job performance with a minimum of support from other people."

Table 2: Explanation of Gery's EPSS Definition

A workflow learning infrastructure must enable all these capabilities. Just as there is software for authoring eLearning courses, there is also software to author, deploy, and maintain an EPSS that will do all that Gery envisioned. EnABLE drives the development of the workflow learning infrastructure. Organizations should develop this infrastructure based upon their ability to:

- Develop, implement, and optimize 5 Moments of Need Solutions.
- Support learning and performance while people are performing the work of the organization.

Assess Your Current Instructional Systems Design Methodology

The following six questions provide a high-level means to assess your current ISD methodology against the need for workflow learning and EnABLE.

Question 1: Does learning correlate with the workflow? The only way an organization can hope to efficiently produce a 5 Moments of Need solution is to employ an ISD methodology that correlates learning to how people do their work. This is where traditional ISD methodologies often fail, and this failure seriously threatens the effectiveness of any learning solution. A fundamental reality from applied cognitive research is this: how learners encode skills (including associated knowledge) during learning affects how efficiently and effectively they retrieve and translate what they learned to successful on-the-job performance. Here's an example to illustrate. Please follow this instruction:

Quickly recite the letters of the alphabet backwards by every third letter.

Did you find that to be difficult? The instruction asks you to retrieve information from long-term memory in a way that is not correlated to how you encoded (learned) it. Similarly, when formal learning is not correlated to job performance, people find it equally difficult to apply what they "learned" to actual work tasks.

The following figure shows a traditional training plan on the left and a workflow performance approach on the right. The lack of correlation between the two is obvious.

Training Plan:	Performance on the Job:
Conduct • Conduct a Check-in Audit at Day's End • Conduct a Review with Drivers and Pre-loaders • Conduct a Monthly Employee Relations Meeting • Conduct a Monthly Safety Meeting	**Review the Previous Day** • Monitor and Track Driver Group Performance Based Upon Key Indicators • Measure Individual Driver Performance • Monitor and Track Pick-up Compliance • Review Concerns and Follow-ups
Monitor and Maintain • Maintain and Update Your Outlook Calendar and Tasks • Monitor and Track Driver Group Performance Based Upon Key Indicators • Monitor and Track Pick-up Compliance • Monitor Exceptional Performance	**Prepare for Today** • Pre-scan Audit a Driver's Car • Read and Respond to Email • Maintain and Update your Outlook Calendar and Tasks • Prepare and Conduct a Virtual On-Job Supervision • Review Results of Your OJS Schedule with Your Manager • Plan Your OJS Schedule • Prepare for and Provide Progressive Discipline • Monitor Exceptional Performance
Plan and Prepare • Plan Your OJS Schedule • Prepare and Conduct a Virtual On-Job Supervision • Perpare for a Meeting with a Manager • Prepare for and Provide Progressive Discipline	**Prepare and Meet with the Manager Center Team** • Prepare for a Meeting with a Manager • Review Results of Your OJS Schedule with Your Manager • Review Workgroup Results
Review and Prepare • Plan Your OJS Schedule • Prepare and Conduct a Virtual On-Job Supervision • Prepare for a Meeting with a Manager • Prepare for and Provide Progressive Discipline	**Talk with Employees** • Recognize Exceptional performance • Conduct a Review with Drivers and Pre-loaders (The Safety, Service, • Profitability, Volume, Employee Process) • Provide Progressive Discipline • Resolve Customer Concerns and Follow-ups with a Driver • Conduct a Monthly Employee Relations Meeting • Conduct a Monthly Safety Meeting
Review and Resolve • Review and Respond to Email • Resolve Customer Concerns and Follow-ups with a Driver • Review Results of your OJS Schedule with your Manager • Review the Daily Pre and Post Sort Inspection • Review and Resolve Dispatch Concerns with the Dispatcher • Review Concerns and Follow-ups • Review Workgroup Results	

Figure 5: Comparison of Traditional Training Plan with Plan for Supporting Performers

Generally speaking, traditional needs analysis ignores the workflow when designing training. This makes it just as difficult and time consuming for learners to apply what they learn in formal instruction to their jobs as it was for you to recite the letters of the alphabet backwards by every third letter.

In contrast, EnABLE focuses on performance first, scoping and prioritizing business requirements. Its design process is workflow centric, so a performer will encode what they learn in a way that is easy to retrieve when they perform their job.

Question 2: Do our solutions minimize time away from work? An effective workflow learning strategy must minimize the extent to which people stop their work to learn. Optimum learning occurs while people actually perform their work. This is a sweet spot for the discipline of workflow learning. The EPSS is the learner's digital job coach, with all the resources intentionally orchestrated to facilitate successful job performance at the task level. EnABLE facilitates the design, development, and ongoing optimization of the EPSS, most critically through the Learning Experience and Performance (LEaP) blueprint upon which the EPSS is built.

Figure 6 below illustrates the layered framework a well-designed EPSS uses to provide instant access to 5 Moments of Need support for every task people need to perform in their flow of work. Within 2 clicks and 10 seconds, performers can access a high-level view of the steps for any job task they don't know how to perform. With another click, they can access the next layer, which provides greater detail around these steps. And they can follow the steps while they actually perform their work. If the simple steps aren't sufficient, another click provides access to the supporting knowledge layer where they access the conceptual information they need to understand about that job task. Or if they need access to reference resources like policy information or a decision support tool, they can find them with a single click into the reference resources layer. All these layers are keyed to the context of the job task at hand.

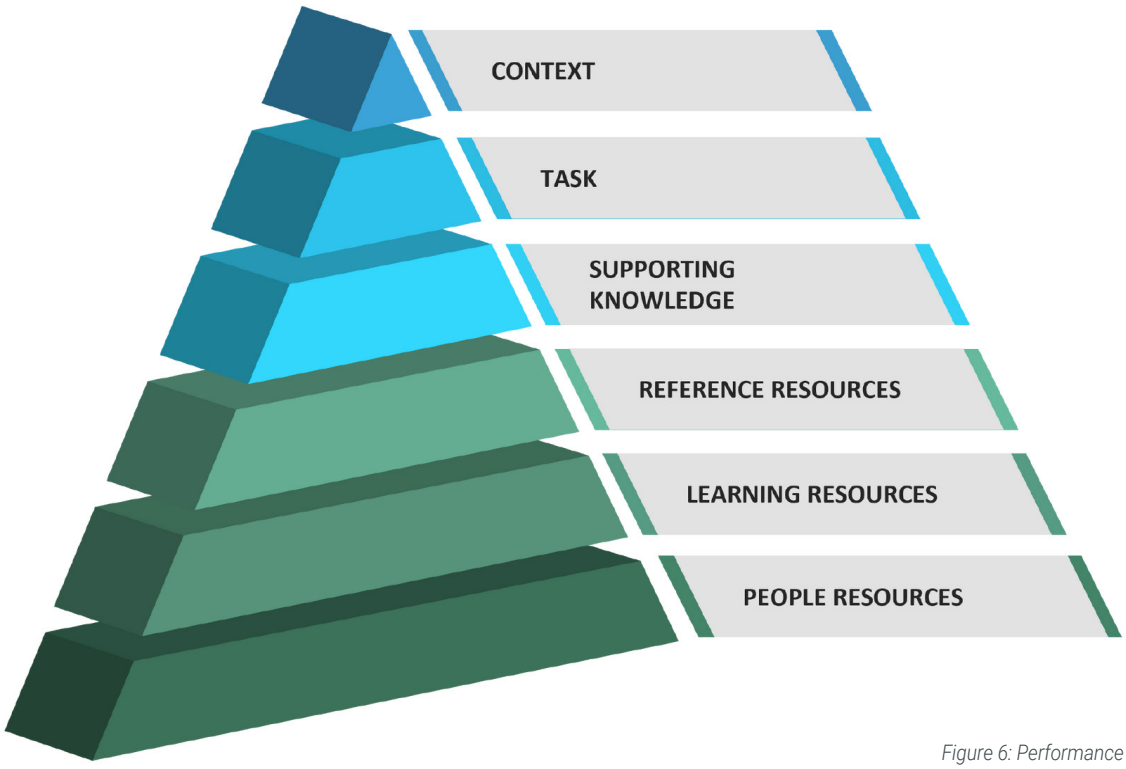


Figure 6: Performance Support Pyramid

Every time people use an EPSS to support themselves in the work they do, they are learning experientially. A vital distinction of workflow learning is the ability to learn experientially while working. This is very different from using eLearning, video training, printed tutorials, and even on-the-job training. Although these "just-in-time" training resources are available to learners in their workflow, they still require learners to stop working in order to gain access, learn, and then translate what they have learned to their work. This is not optimal workflow learning. Here's why:

When people stop their work to complete a self-learning module or segment, they still must figure out when and how to apply what they learned to their actual work. Workflow learning shouldn't be

defined merely by where learners are when they learn. That is part of it, but workflow learning must also be defined by the degree to which employees are engaged in learning while they perform their work. EnABLE facilitates that synergy.

Question 3: Does our methodology mitigate the risks of failure? The EnABLE methodology distinguishes tasks that can be safely learned in the flow of work from those where the impact of potential failure justifies stepping away from work to learn in a formal setting. After formal training, performers get ongoing support when they return to the workflow. On average, this approach cuts formal training time in half.

In the EnABLE methodology, once we've identified and organized the job tasks and their supporting knowledge requirements, we use the scale in Figure 7 below to identify tasks where failure can be a safe learning experience vs. tasks where failure would have critical to catastrophic consequences. The latter are then dealt with in formal training.

Consider the cost benefits to the organization when formal training does not have to deal with tasks that can be learned on the job in "safe failure" experiences. Training time is reduced. Time away from work is reduced. And instructors can focus their time and methodologies on those skills where the consequences of failure are critical to catastrophic.

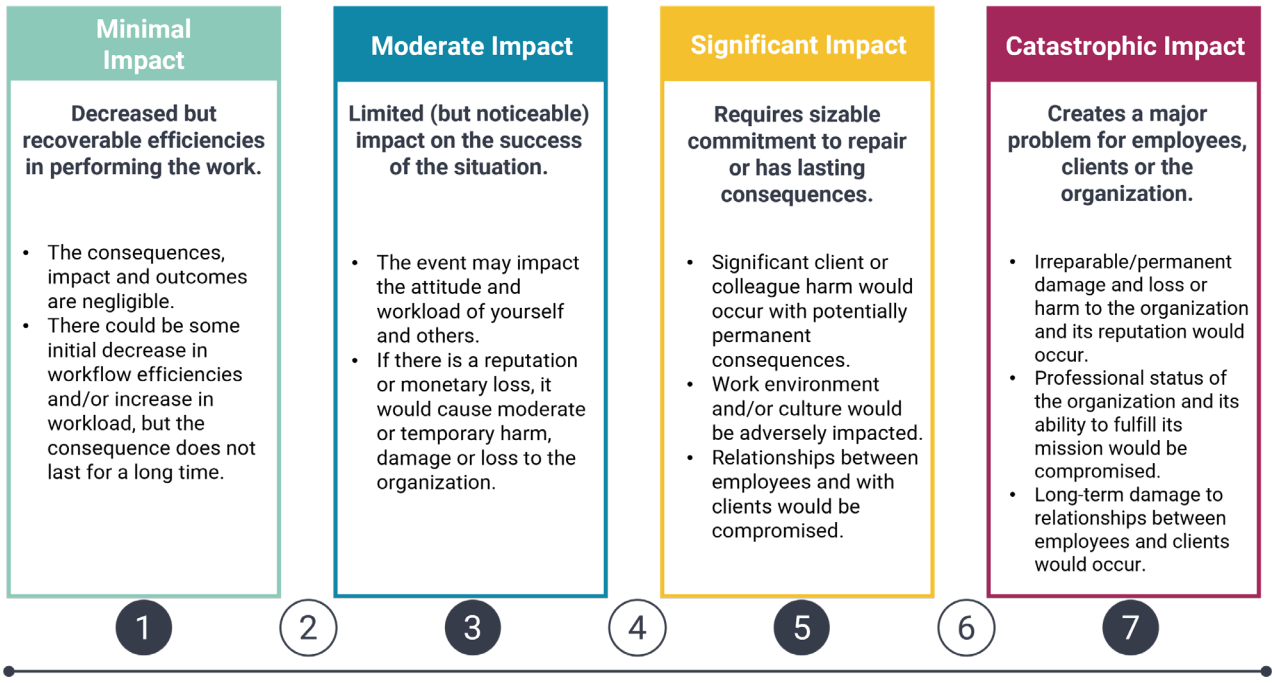


Figure 7: Critical Impact of Failure Chart

This rating scale helps us determine which tasks merit the investment of formal training. For the most part, job tasks that score between 1-4 on the scale can be safely learned with an EPSS as people perform their jobs in the workflow. If they make a mistake that does not have significant to catastrophic impact on the organization or the lives of people, they can use a properly designed EPSS to recover quickly, thus learning through experience as they work. This is “safe failure”. However, those tasks that score between 5-7 merit the rigor of effective instruction in a formal class setting that must include feedback and an appropriate level of mastery checking.

In contrast to EnABLE, most traditional ISD approaches prioritize learning based upon frequency and/or complexity. These are secondary criteria when compared to the consequences of failure.

Question 4: Do we provide immediate, intuitive access to micro-learning bursts? The movement to workflow learning is rightly pushing organizations to break their lengthy courseware into “micro-learning bursts” that focus on a specific task or area of supporting knowledge. Clearly, there are moments in the workflow when learners must step away from the work they are doing to learn. But workflow learners don’t have the time or disposition to search for and move through a lengthy eLearning module or watch a 30-minute video. Instead, they need instant access to just the learning they require at their moment of need, but no more than that. Technology today provides us with the ability to offer 3- to 7-minute, self-paced, micro-learning bursts proactively and reactively. Such personalized content management systems are impressive.

But technology alone can’t carry the day. Creating micro-learning bursts isn’t a straightforward effort. It requires altering the ISD process to not only create micro-learning bursts but to also weave them into more comprehensive formal learning experiences. Instructional systems designers (ISDs) also need to know how to properly restructure existing courseware into micro-learning bursts that at the same time fit together in a cohesive, instructionally sound course. It doesn’t work to simply push a course off the wall like Humpty Dumpty and break it into a bunch of micro-learning pieces. Learners must be able to put these micro-learning bursts “back together again” in their minds and skill sets. The EnABLE methodology provides straightforward guidance for organizing content in this way.

Question 5: Do we provide "Adaptive Learning" support? All performers have knowledge gaps that dynamically form over time. The gaps are different for every person. Historically, our only option to fill these gaps has been to pull people away from their work and push them through refresher courses. This approach is wasteful and anything but refreshing.

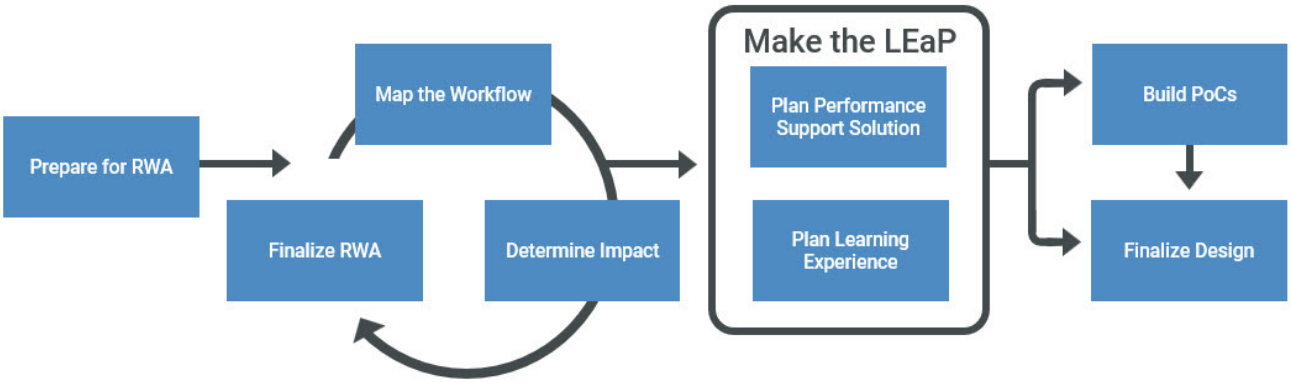
Alternatively, EnABLE identifies and prioritizes knowledge requirements based upon critical impact of failure. This justifies the use of Adaptive Learning support in the workflow. Today's technology-enabled methodology can proactively push learning checks into the workflow. These non-threatening learning checks employ remarkable algorithms that help workflow learners fill their personal knowledge gaps by proactively viewing micro-learning experiences relevant to their specific needs at a pace determined by their own level of proficiency and rate of forgetting. And the learning checks can be tracked and documented for accreditation or regulatory compliance.

Question 6: Do our solutions accommodate unlearning to relearn? The greatest threat to learning is change. As mentioned, keeping skills current can only happen in the workflow. Why? It's been estimated that 70% of adult knowledge is fully automated, meaning it is so habituated we don't have to think about it to do it. This "deeply learned knowledge" is very difficult to unlearn.

The challenge to unlearn and relearn will never be solved by pulling people out of the workflow. Within the workflow, learners have context and the opportunity for ongoing reinforcement over time that overrides automated skills with new skills. Every workflow learning strategy must include a plan for leveraging people, technology, and processes to enable learning at the speed of change (see the section titled "The Need for Continuous Optimization" on page 24).

During the Analyze to Design phase of the EnABLE methodology, ISDs guide subject matter experts by Mapping the Workflow and Determining Impact as shown in the graphic on the following page. Mapping provides the information ISDs need to develop a detailed Learning Experience and Performance (LEaP) plan for building a 5 Moments of Need solution. The following series of graphics provides a brief overview of these key practices.

Analyze to Design



The Analyze to Design process contains practices that are core to a performance-first methodology. The specific tasks within this process are rapid, systematic, and workflow centric. The following is a brief description of these key practices.

Map the Workflow

Mapping the workflows rapidly identifies specific job tasks associated with organizational performance improvement requirements determined during the “Engage to Align” process. Tasks are organized into workflow processes. Supporting knowledge is identified and mapped to tasks.

Guiding Principles

Take a bottom-up rather than top-down approach to identifying workflows. Begin at the task level and work up.
Identify tasks first ahead of supporting knowledge. Wait until after tasks are identified and organized before identifying supporting knowledge.
Determine the interrelationships of tasks, supporting knowledge, and audiences.
Organize information to optimize working memory and facilitate encoding and retrieval (the “chunking” principle).

Determine Impact

SMEs assist in rating the tasks and supporting knowledge using a tailored “Critical Impact of Failure” rating scale like the example shown earlier in Figure 7.

Guiding Principles	Focus the assessment on the impact to people and the organization.
	Assume that all tasks are important as you consider the critical impact of failure.
	Start with critical impact ratings; then, move to other types of analysis (frequency, complexity, and importance) if needed. If there are many ratings in the 5-7 range, then additional levels of analysis can be used to gain a better understanding of the tasks.

Make the Learning Experience and Performance (LEaP) Plan

The primary deliverable in this process is a detailed LEaP blueprint. The ID, working with the SMEs, develops a detailed design plan, or LEaP blueprint, for building out the entire 5 Moments of Need solution and justifying the various solution modalities (including the need for an EPSS).

Guiding Principles	Solve for the moment of Apply first.
	Focus learning and performance solutions on the job tasks according to their critical impact of failure to ensure employees can perform effectively when called to act.
	Use the LEaP to define the optimum blend of resources at the task level to ensure sustainment of performance at all 5 Moments of Need.
	Ensure employees have what they need to effectively perform at the task level.

The Need for Continuous Optimization

Extending learning into the workflow with the enabling power of an EPSS has one significant challenge. Any deliverables that reside in the workflow to support performance must be kept **CURRENT** and **RELEVANT**. The EnABLE methodology incorporates proven principles of EPSS design for meeting these optimization requirements.

CURRENT: Keeping content current in an ever-changing work environment requires development and implementation of content management practices and supporting technology, especially performance support technology. Governance, curation, and metadata management practices must align with the broader knowledge management efforts of the organization. This area requires specialized attention. Outdated content can quickly grow out of control and damage the organizational will to pursue the mighty benefits that overshadow these few challenges.

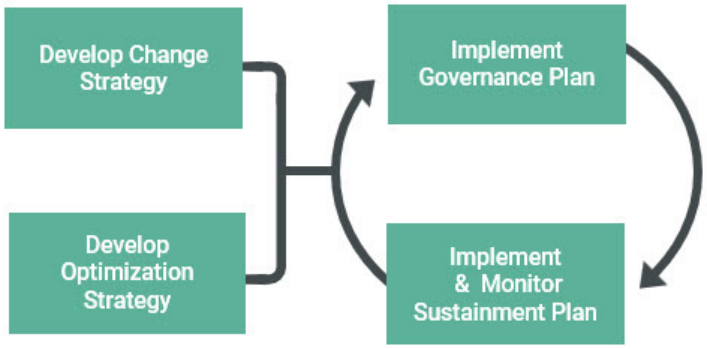
The risk of outdated content alone can cost-justify the investment in EPSS authoring software. Because an EPSS is embedded in the workflow, employees using it can flag outdated content. Change notifications can be directed automatically to designated content stewards. Changes made by content stewards can be efficiently curated, flagged, prioritized, and then pushed back out through the EPSS. Powered by the right software, an EPSS provides the only scalable means for L&D to fulfill its responsibility to keep the content of workflow solutions current.

RELEVANT: Workflow learning solutions must be relevant. Performers will initially judge a tool by its "curb appeal". They will ask, "Will this thing help me?" That question is readily resolved by incorporating the workflow learning solution into formal training.

However, long-term use is based on the solution providing access to information and resources that are current and relevant to performers' specific moments of learning need. Long-term currency and relevance present a significant optimization requirement, and the functionality of the EPSS must remain relevant along with content and resources.

In the Leverage to Sustain phase of the EnABLE methodology, shown below, the critical work of designing for sustainment takes place. During this phase, the sustainment strategy for keeping the 5 Moments of Need solution current and relevant is operationalized.

Leverage to Sustain



Agreements are developed with the business and defined processes are implemented with assigned roles and responsibilities. Processes are then automated as much as possible to constantly improve 5 Moments of Need solutions.

Establish a Sustainment Strategy

Guiding Principles

Pursue technical capability to notify performers of changes. The capability must be as deeply embedded and as close to the moment of Apply as possible.
Employ technology as the means for automating a governance strategy with notifications routed to content stewards when content is due for review or when it is found to be out of date or unhelpful.
Employ technology as the means for engaging performers in helping keep content current and meaningful.
Monitor usage to identify areas within the EPSS that require attention due to lack of use.
Engage technology-aided collaboration to address the moments of Solve and Change.
Optimize development and maintenance by imposing consistent content and design structures within and across modalities.

EnABLE = Ongoing Business Impact Measurement

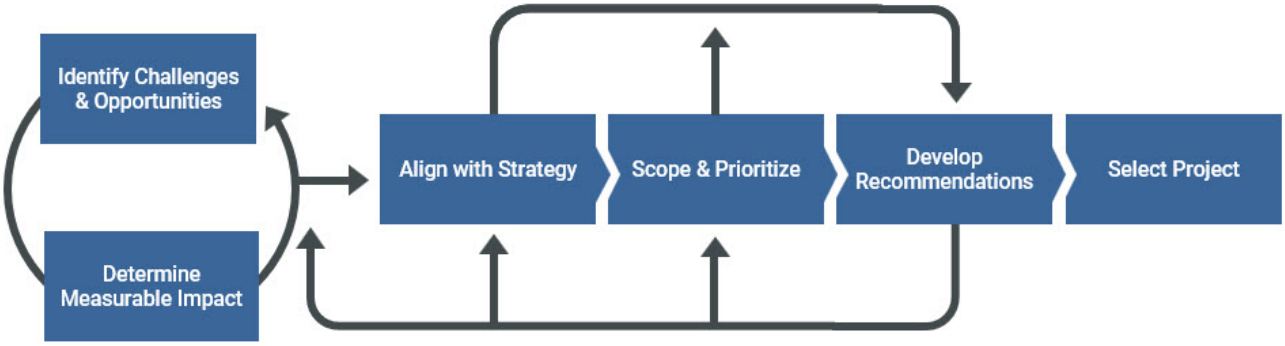
The greatest challenge in connecting learning outcomes to business impact has been gathering relevant data from the workflow. An EPSS can gather that data because it is embedded in the actual workflow where its impact on bottom-line results can be measured. Because the data is digital, it can be gathered in real time while people are performing their work. And an EPSS supports specific job tasks, so it can be precise in what performance it is measuring.

Figure 8 basically turns Kirkpatrick's model on its side and shows how an EPSS can connect learning to business impact.

Figure 8: The Path from Learning to Measurable Benefit

Engage to Align

The EnABLE methodology addresses measurement at its earliest stages. During the Engage to Align stage, performance consultants not only identify business challenges and opportunities, but also measurable business outcome targets.

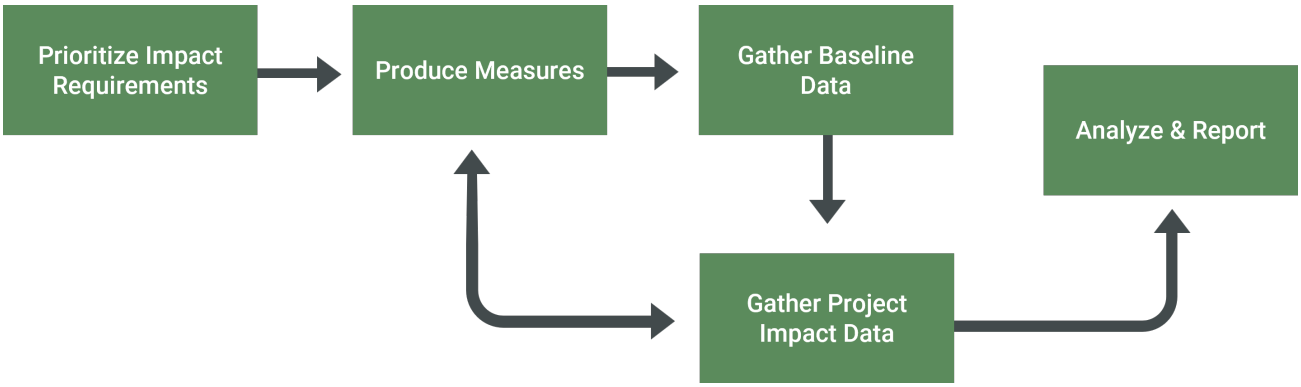


Identify Business Performance Challenges and Opportunities

Guiding Principles	Apply a performance mindset that drives business results.
	Solve for business challenges and opportunities.
	Pursue measurable results.

EnABLE also provides tactical guidance for monitoring usage during the Leverage to Sustain phase to help optimize the 5 Moments of Need solution, and the Evaluate for Impact phase shown below provides tactical guidance for bridging the gap between training and actual business impact.

Evaluate for Impact



The final process, Evaluate for Impact, engages the capabilities of an EPSS in gathering data from the workflow to help determine the ongoing business impact of the solution.

Guiding Principles

- Pursue the metrics identified during the Engage to Align phase.
- Focus usage on tasks, concepts, and tools.
- Confirm successful performance according to critical impact ratings.
- Monitor for trends and KPI correlation.

Conclusion

Our EnABLE ISD methodology is foundational for providing organizations with the capabilities to respond to adaptive challenges–be they opportunities, threats, or crises–through the acquisition and application of knowledge and skills. Without this ability to quickly learn and effectively apply the collective knowledge and skills of their team members, organizations will respond slowly and clumsily to today's fast-changing business environment, potentially falling behind their competitors. A critical question hangs in the balance: to what degree are learning leaders and their respective teams prepared to help their organizations navigate this transformational change?

The limitations of traditional learning paradigms and their associated ISD methodologies threaten L&D's value propositions to organizations today. It's past time to change. This evolution must begin with adopting agile, performance-focused practices that will shift mindsets and provide the functional justification for investing in the technical capacity to support performance.

Bottom line: learning at the speed of change begins with L&D aggressively developing its capacity to design, develop, produce, and sustain 5 Moments of Need solutions that reach deeply into the organizational workflow. EnABLE provides guidelines to create those solutions that allow employees to successfully perform at the moments of Apply, Solve, Change, New, and More.

Comments from EnABLE Users:

"EnABLE has provided me with a bridge to connect the world of Learning and Development to business success. Performance is the endgame and designing with EnABLE aligns our efforts with business goals."

- Glynnis Richardson, The University of Queensland

"The EnABLE methodology resolved a lot of issues I was having using traditional methodologies. The systematic focus on performance helped me avoid content dumps without losing the supporting knowledge so crucial to understanding the "why". The critical impact of failure analysis made deciding what to train utterly clear. Planning the performance solution became easy, and I was finally able to focus on planning the learning experience–something that usually gets swept away by time constraints. Finally, I'm able to design a flexible learning solution that is relentlessly focused on employee performance, and I can present results that demonstrate that the solution is helping to move the needle on business priorities."

- Karen Conlin, Stikeman Elliott LLP

"EnABLE has revolutionized learning, producing learning that results in performance. For the first time, staff development can identify their direct contribution to improved staff performance and organizational success."

- Molly Petroff, Workflow Learning Design Consultant

"The EnABLE methodology has significantly impacted not only my work, but that of my coworkers. The strong research from cognitive, behavioral, and experiential learning theory allows us to build upon our previous ways of working with the addition of a deeper connection to learners. By following the EnABLE methodology, we've successfully completed global projects, become better business partners by more proactively solving problems and supplying answers, and ultimately solved for the learner by reducing historical content and allowing them to practice and apply more quickly than ever before."

- Meghan Castillo, HubSpot

About the Authors

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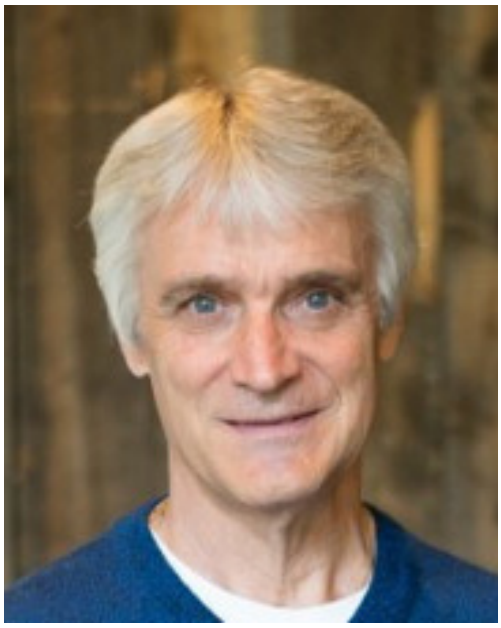
Con has deep experience helping organizations optimize their complete learning ecosystems. His expertise lies in assisting companies with identifying and implementing 5 Moments of Need solutions from start to finish: from the methodology, technology, and organizational support infrastructure to the design, build, implementation, optimization, and evaluation of these solutions.

Con has also worked with Learning and Development teams to establish collaborative instructional development and maintenance processes to eliminate wasteful redundancies and focus on specialized skills and knowledge. These collaborative development models have provided significant cost benefits in environments of constrained resources and overwhelming development requirements.



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Bob has been an active and influential leader in the learning and training industry for more than 30 years and is renowned worldwide for his pioneering role in new approaches to learning.

He is an influential voice in the Learning and Development industry, speaks at conferences, and is an active participant and author within industry associations such as ISPI, ATD, the Elliott Masie Learning COLLABORATIVE, The e-Learning Guild, and CLO Symposium/Magazine.

Bob has worked with clients such as McDonald's, Bank of America, Herman Miller, Hitachi, Disney University, Progressive Insurance, Huntington National Bank, Bank of America, Travelers Insurance, The Defense Acquisition University (DAU), Defense Intelligence Agency (DIA), Boeing, ADP, Amway, CDW, GE Medical, Humana, and ExxonMobil.

About APPLY Synergies

APPLY Synergies, a 5 Moments of Need company, specializes in helping learning professionals design, develop, maintain, and measure effective learning and performance support through the 5 Moments of Need framework and EnABLE methodology.

Find out more at www.applysynergies.com.