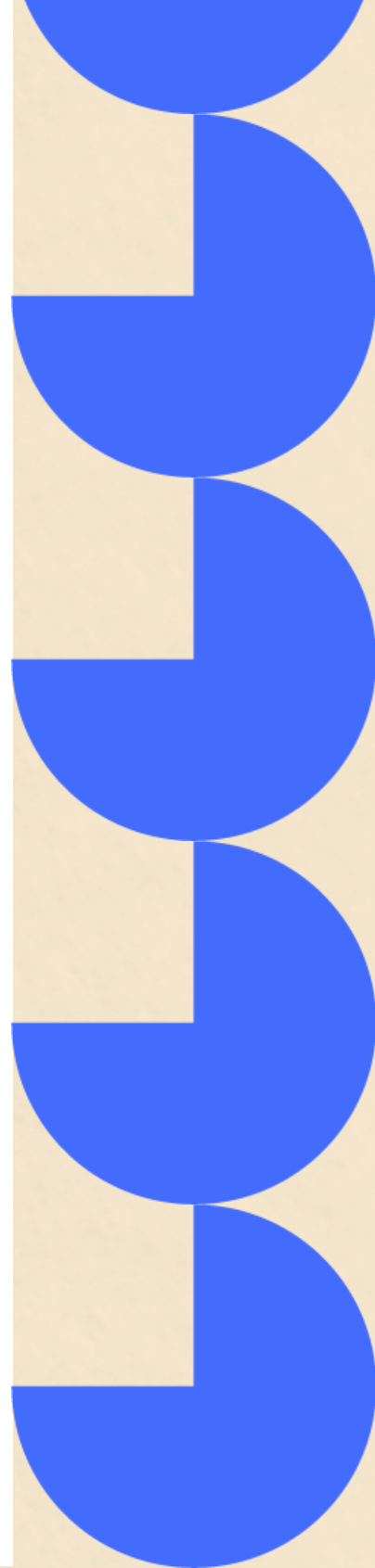


EBOOKS

Establishing a learner-first training model

Learn how to build training around your learners for a healthier, happier, smarter workplace.



About this book

**The learner has always
been at the heart of
everything that we do.**

Back when Coassemble was just an idea, our founder Jude was pioneering learner-first training design, changing the way people were thinking about content authoring and placing the learner as the focus of eLearning design.

When Coassemble was born, every aspect of the platform was built with the learner in mind.

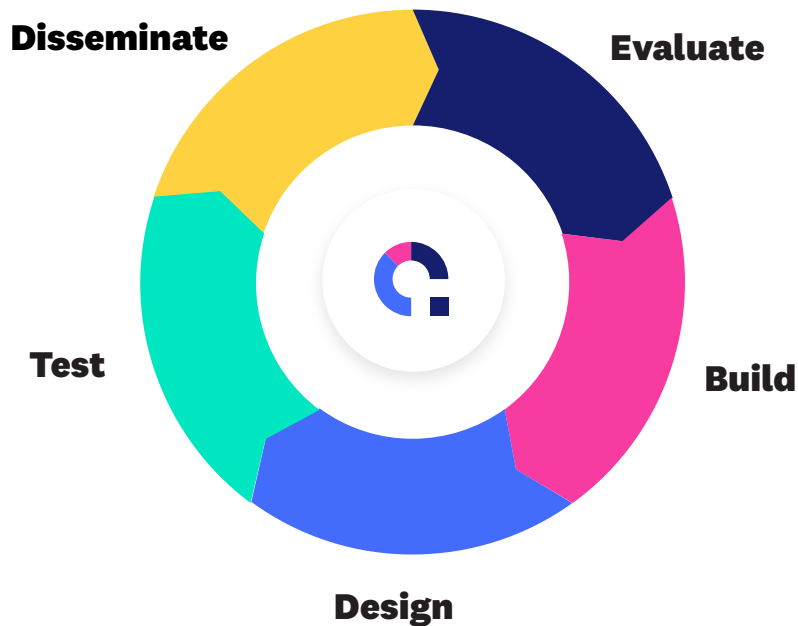
Since then, we've worked with hundreds of businesses to set up their training around their learners.

This book aims to put in place the framework that we've developed and refined over the years, providing a step by step guide to implementing your own learner-first training model.

It's designed for businesses of all sizes; organizations with established training processes or with none at all.

Whilst we think that you'll get the best value out of this book by following it step by step, we've also structured it so that you can start reading from any section you'd like. And remember - if you have any questions at all, you can find us at <https://coassemble.com/>.





What is the learner-first model?

Intro

In a learner-first training approach, trainers always start with the learner. The learner is the basis for every aspect of a company's training strategy - from the company's learning goals, to their learner pathways, to the tools that they choose to train and the way they design their training.

Whilst this may seem like common sense, it's actually not what a lot of trainers do.



A quick note! When we talk about trainers, we mean anyone looking to share knowledge in their organization - whether they're HR managers, training coordinators, sales directors, business owners, or more.

Training misconceptions: How organizations usually approach training

Time-poor trainers often focus on choosing their training platform, their content medium, and their delivery mechanism for staff training.

Questions such as these arise:

What LMS should I
use to train my staff?



Before questions like these:

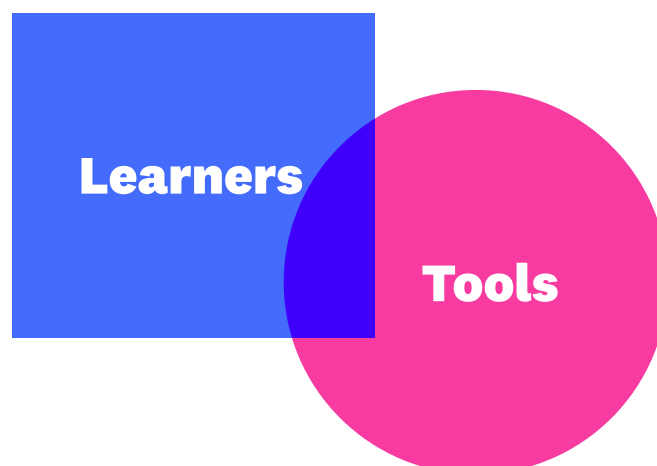
Who am I training?



This is a tool-first training approach. Instead of looking at the learner first, the trainer starts by evaluating the tools they have on hand and trying to fit their learners into predefined platforms and processes.

On a broader level, the tool-first approach is a case of putting tactics before strategy. By thinking about how to execute training before thinking about learners themselves, the learners are forgotten until the training itself is rolled out.

This is why in the tool-first model, trainers often find themselves trying to fit square pegs **(their learners)** into round holes **(their tools)**.





The learner-first approach: Round pegs, round holes

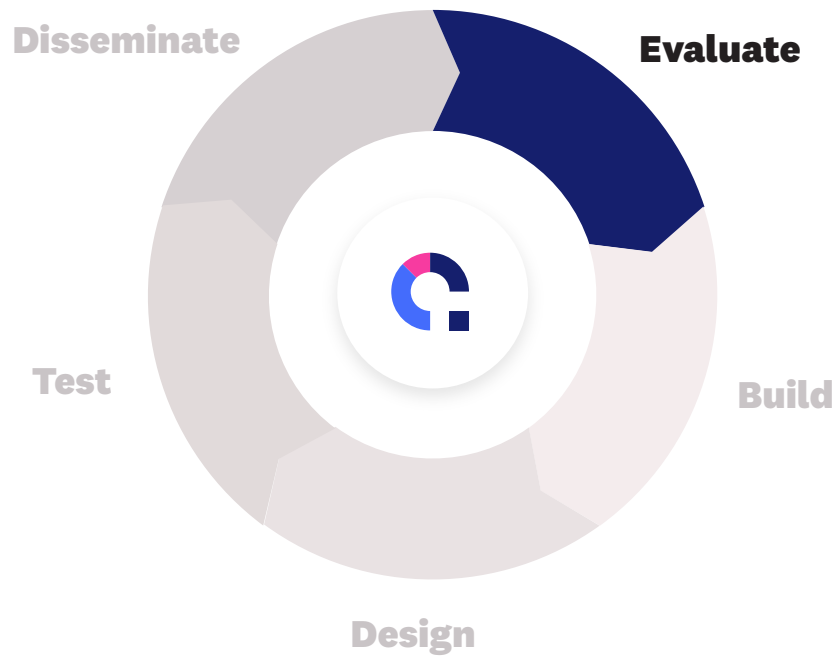
In the learner-first training model, strategy comes first and tactics come second. Trainers are able to see what shape their pegs are, and fashion appropriately sized holes.

In short, by putting the learner first, trainers ensure that the most important part of the learning strategy - the learner - has success. And when learners have success, the learning strategy itself succeeds.

When learner pathways are structured, tools are chosen and learning is designed with the learner in mind, trainers will see more engaged learners, better training outcomes, and happier, healthier, smarter workplaces.

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Evaluate

Intro

- Who are my learners?
- Why do they need to learn?
- What knowledge do I need to share?

The evaluation stage is about gaining as much understanding of your learners and your learning goals as possible before building out your training.

By starting your training process with a comprehensive understanding of your learner, your training structure, tools and content will flow seamlessly.

Creating learner personas

The first step in your evaluation stage is to gather as much information on your learners as you can. The most comprehensive way to do this is by creating learner personas.

A learner persona is a representation of a learner group, distilled down into a profile that you can easily refer back to when creating your training strategy. Whilst the learner persona is fictionalized and represents a group of learners, it is a good way to begin thinking of your learners as people and designing your training accordingly.

Your learner persona should contain both demographic information - for example, age, department, and geographic location - and psychometric information. Psychometric information covers your learner's motivations and needs. For example, what are your learners' reasons for working at your company? What drives them to complete learning? What's their preferred method of learning?

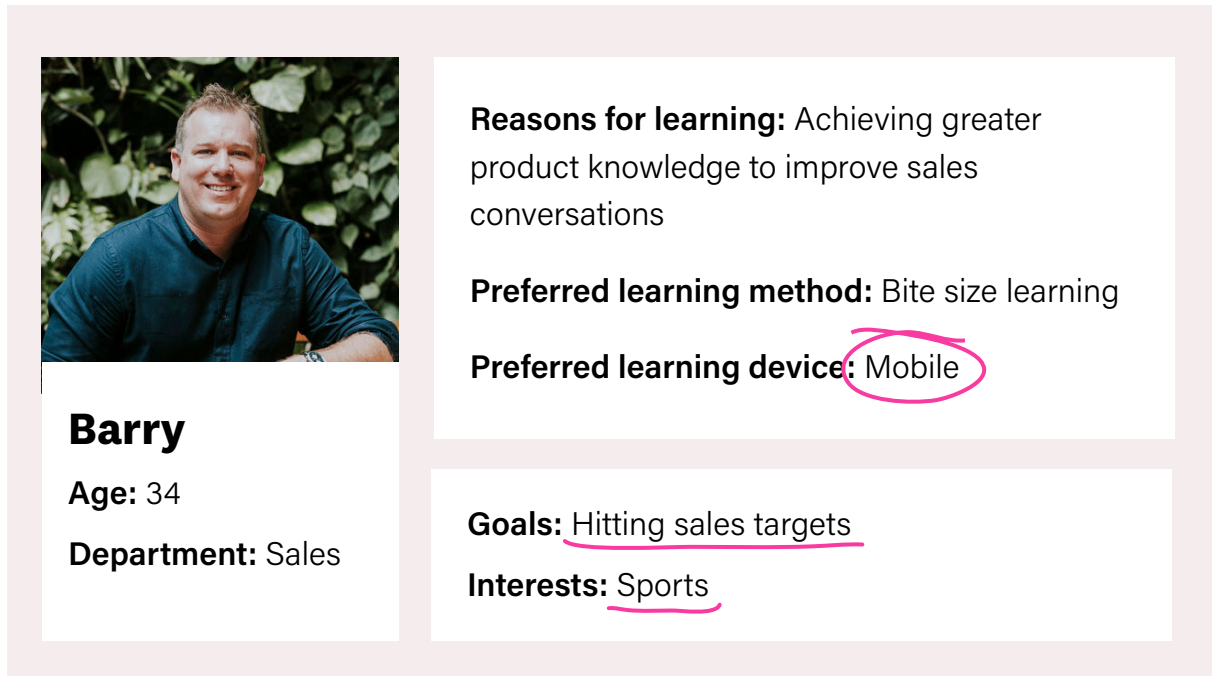
Demographic Information

- ✓ Age
- ✓ Department
- ✓ Geographic Location

Psychometric Information

- ✓ Motivations
- ✓ Needs

Here's an example of a basic learner persona:



Barry
Age: 34
Department: Sales

Reasons for learning: Achieving greater product knowledge to improve sales conversations
Preferred learning method: Bite size learning
Preferred learning device: Mobile

Goals: Hitting sales targets
Interests: Sports

Whilst the example above is quite basic, it illustrates the power of a learner persona. By drilling into Barry's persona, we start to understand the best methods for training him (mobile), his reasons for learning (hitting sales targets), and even how we could theme his learning to maximize engagement (sports).

As you make your learner personas more comprehensive, they will become exponentially more powerful - by understanding your learner groups in great detail, you'll be able to tailor your training to such a degree that your training outcomes will soar.

Remember, you may have one learner persona or multiple depending on the size of the learner base that you're training. If you find that a group of learners doesn't fit into any of your learner personas, it's a good indication that you need to create another persona just for them.

[Download learner persona template here](#)

Identifying learning goals

Once you have a comprehensive understanding of your learners, it's time to identify your learning goals. Your learning goals will help you determine what knowledge you need to share with your learners, as well as defining what success means to you when rolling out your training.

1

Identifying your learning requirements: What do my learners need to learn?

Defining your learning requirements means knowing exactly what your learners need to learn. Whilst this may sound obvious, it can get a little more tricky as your learner base grows.

For example, you may be developing a company-wide training course for a new core product offering.

Your sales team may need to learn the key sales features of the new product, how to successfully demonstrate it to potential customers, and potential objections they may encounter around purchasing the product. Your customer success team may need to learn more about how the product is engineered; they don't necessarily have an interest in key sales features or demonstrations, as they're dealing with customers who have already bought the product.

Learning requirements go deeper than basic distinctions like department and geographic region. For example, one section of your sales team may be selling your new product to a certain target market - say, wholesalers. Their product training should focus on the product from the view of the wholesaler.

That's not to say that you should be building different training for each of your individual learners; realistically, most trainers simply won't have the time to do this.

Instead, we recommend identifying the learning requirements for each of your learner persona groups.

2

Locating knowledge gaps: What do my learners already know?

Next, you'll need to gain an understanding of what your learners already know. One surefire way to kill engagement levels is to try and teach your learners something that they already know. By locating knowledge gaps and focusing your training on those gaps, you'll ensure that precious training time isn't wasted.

Here are some objective ways you can locate knowledge gaps in your business:

- Develop a pre-testing survey around your topic of training
- Analyze past training and test results

Remember - the more you can tailor your training strategy to individual learners, the more effective it will be. We recommend revisiting your learner personas and locating knowledge gaps for each persona group. For example, if your training involves Workplace Safety then you could deliver a survey around that topic to each of your learner persona groups. By evaluating your survey results, you may find that one of your groups has a solid grasp of Workplace Safety, whilst another is sorely lacking in comprehension. Knowledge gap located!

If you're a larger organization with a sizeable training budget, you can use emerging technologies to locate knowledge gaps in real time. Adaptive learning platforms are a great example of an emerging learner-first technology.

Adaptive learning technologies are able to locate knowledge gaps in real time, automatically evaluating a learner's understanding of a concept and adjusting their learning pathway to suit that level of understanding.

For example, if Jane from HR repeatedly struggles with questions around social media use in the workplace, an adaptive learning technology would give her extra content and questions around that topic as she progresses through her training pathway. If Sarah from Finance aced her social media use questions and had a clear understanding of the topic, an adaptive learning technology would move her on to a new learning concept. This ensures that concepts are skipped when they are fully grasped by the learner, or further developed when not.

Whilst they may seem like an innovative idea, adaptive learning platforms are actually just an automated version of what a good learner-first trainer does when locating knowledge gaps: identify holes in their learners' understanding and plan their learning pathways accordingly.



On a budget? *With a bit of extra effort, you can set up adaptive learning pathways using tools like Typeform and embed them within a Coassemble course to replicate the adaptive learning technologies used by Fortune 500 companies*

3

**Defining learning goals:
What knowledge do I need to share?**

The final step in defining your learning goals is to combine your learning requirements with your knowledge gaps.

By starting with what your learners need to learn, and taking away what they already know, you'll be able to identify the knowledge that you need to share in your training to hit your learning goals.

The following equation puts it simply:

$$\begin{array}{rcl} & \text{What do my learners need to know?} & \\ - & \text{What do my learners already know?} & \\ \hline = & \text{What knowledge do I need to share?} & \end{array}$$

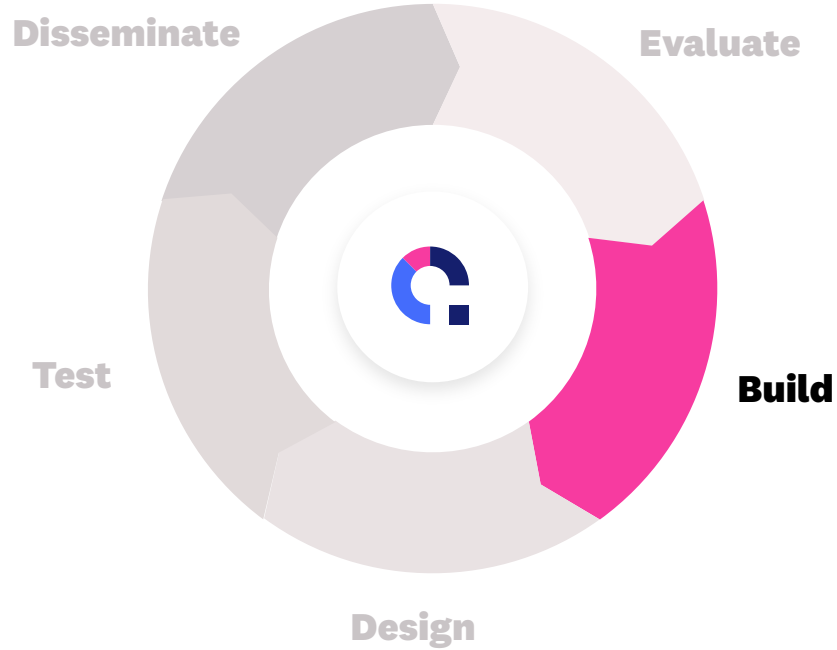
Complete the above for each of your learner personas, and you'll have a detailed and accurate list of learning goals.

[Download Learning goal template here](#)

Recap

If you've finished this stage with a set of learner personas and a clear understanding of your learning goals, allow yourself a quiet fist pump - you've paved the foundations for a comprehensive learner-first training strategy.

The next part - building it - will be easy.



Build

Intro

- How are my learners going to learn?
- What tools will I use to train them?

The build phase is about using your newfound understanding of your learners and learning goals to build your training structure.

Structuring learner pathways

Once you've mapped out your existing learner pathways, you'll quickly begin to see gaps in each pathway.

There may be areas where your learners don't have full clarity around what is required of them or what to do next, such as an email that notifies them that they have training to complete but does not contain a link to the training itself.

There may be gaps in training from the trainer side; you may identify that learners complete one long training module in a single sitting and never revisit it. You may also find that there are stages of your learner pathways that can't be tracked or are prone to human error, such as trainers having to manually inform learners that they have training to complete. All of these issues will be easily identified and fixed if you've properly mapped your learner pathways.

To structure new learner pathways, simply go through each of your learner pathways and assess how each step could be improved, or whether further steps need to be added. Or, if you're setting up training for the first time or want to change your training process radically, start to map out new learner pathways with your learners in mind.

Whichever way you decide to structure your learner pathways, the process will be easier if you've defined your learning goals, as you'll have an idea of what knowledge you'll be communicating to your learners.

Here are some key questions to ask yourself when evaluating each action that your learner has to take within their learner pathway:

- Does my learner know exactly what is required of them in this step to pass to the next step of their pathway?
- Does this step suit my learner (does it suit their learning habits, timings and preferred method of delivery)?
- Do I have full clarity on what my learner is doing at each step of their pathway (i.e., is it trackable)?
- Does my learner have an opportunity to share that they have completed learning (i.e., social learning)?
- Does the timeline of learning make sense (i.e., do they have enough time to complete this step)?

Choosing learning tools

Now that we've understood our learners and learning goals, and structured our learner pathways, we have explosive knowledge when it comes to choosing our training tools. Take the below scenarios as an illustration.

We're trying to roll out sales training to a millennial, time-poor workforce that have historically shown low engagement with long-form eLearning? Let's prioritize a toolset that allows for the creation bite size learning content, works on our learners' smartphones, and makes use of social learning.

We're running technical product training for a geographically disparate customer success team who are low in technical literacy? Let's focus on finding a tool that has robust virtual classroom features including screen sharing and question forums, and solid post-assessment options.

We want to communicate a small change in our policies and procedures? Email may be a better tool than your LMS here; remember, you often have more tools at your disposal than you think.

Evaluating current learning tools

If you're training for the first time, then you have the advantage of selecting your training tools with a fresh slate. The section below will still be useful for you, however, as it discusses evaluating all the tools at your company's disposal.

The first step in assessing what tools you'll need to train your learners best is looking at what you already have - with your learner in mind.

Whilst Learning Management Systems tie many tools together, and are often the place where the majority of learning takes place, they are not the only tool at your disposal. Learning tools can be anything that assists your learners in their journey to knowledge.

Your company email server may play a key role in notifying your team that new training is ready for them to complete; you may use survey software to seek feedback on trainings; key learning documents may be stored on Google Drive or Microsoft Office.

How about webinar tools, video hosting platforms? Learning tools are no longer just traditional platforms like your LMS and authoring tools - almost all emerging technology can be used for learning in some capacity.

So how do you identify all of your current learning tools?

Using your learner pathways, list each tool that your learners currently encounter on their journey to knowledge. Your LMS and authoring tools will

probably be first on the list, but also include any other software or platform they interact with, even if it's a simple button click. Then, look at the rest of the company tools that you have access to - any software or platforms that you use. Think social media accounts, survey tools, chat bots, messaging software, email servers, email automation softwares, task management platforms, and anything that could be used for design (flowcharts, presentations, mood boards, storyboards).

Once you have a list of your tools, start brainstorming all the ways that they could be used either to help your training process. Your company uses Mailchimp - why not use it to send out a monthly newsletter to inform your team of trainings that are currently available? You may find that your existing tools can augment your Learning Management System and fill in for features that it's lacking.

Take the time to familiarize yourself with your tools - they may contain features that you don't currently know about. You may use Skype to conduct team trainings - did you know that it has a polling feature that can be used for post-assessment?

Bringing it back to the learner

When you're assessing the tools at your disposal, keep your learners front of mind. Refer back to your learner personas to remind yourself of who your learners are and how they prefer to learn.

Evaluate your LMS and authoring tools alongside less traditional tools - are they best suited to your learners? Do they allow for the creation and delivery of the training that your learners prefer?

In the example at the start of this article, we mentioned training a 'millennial, time-poor workforce that have historically shown low engagement with

long-form eLearning! Sure, you can turn to bite size learning and mobile optimisation and keep your learning housed within your LMS. But, if your company has existing social media accounts, why not also create a private Instagram for your team that delivers chunks of learning to them where they live - on social media? We've worked with several innovative companies who are doing exactly this, and who are reaping the rewards of an engaged and upskilled workforce.



Note that the above example also works in reverse - if you have a tech illiterate, ageing workforce, then you may want to overlook that company Instagram account.

Identifying gaps in your tools

Once you've checked all your current tools against your learners, you should have a strong understanding of areas in which your tools are lacking.

To use an example from earlier in this article, you have a 'geographically disparate customer success team who are low in technical literacy', but your company has no tools with screen sharing options and nowhere to host question forums? Tools with that functionality should be top of your list.

Remember, there are a lot of free tools available. In the example above, you could turn to Loom, a free app that let's you record screen capture videos and share them, and Slack, which has a free account that would allow for question and answer sessions, to fill your tool needs.

If you don't have a Learning Management System, or your LMS is lacking in a lot of the features that you need to train your team, you may want to consider purchasing a new LMS.

Tying your tools together

Finally, you'll need to bring your tools together into a toolset - a system of tools that combine to create a single, streamlined learning process. Revisit your learner pathways with your new knowledge of the tools that will best fit your learners, and map out how they will fit into your learners' journey to knowledge.

This is where it becomes important to have a central system that 'houses' your other tools. For many companies, this is their Learning Management System. Whilst the tools mentioned in this article can augment an LMS and substitute for features an LMS may not have, a powerful Learning Management System will bring all your tools together.

Survey softwares, video hosting platforms, and document storage systems may integrate within your LMS. Innovative technologies like your Instagram account or email marketing platform may link back to trainings in your LMS. What's important is that your toolset works together as one; not as a series of disparate systems, as that will make it impossible to properly track your training and get a clear view of your learning process.

Key questions to keep in mind here are:

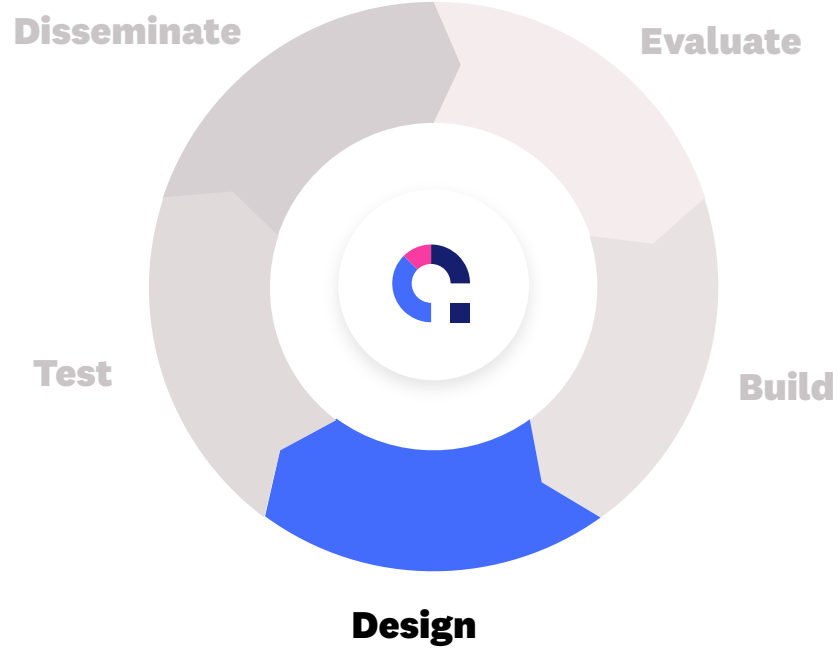
- Do all my tools fit together in a single, integrated digital learning strategy?
- Can I track the training delivered across all my tools?
- Do I have a suitable LMS to house my tools and tie my training together?

Recap

Let's recap where we're at:

- You know who your learners are and how they want to learn
- You know exactly what knowledge you need to share with your learners
- You can plot every step in your learners' journey to knowledge
- You know what learning tools you have at your disposal

So, we've mapped out every step that our learners take in their journey to knowledge, and built out an integrated toolset with our learners' habits in mind.



Design

Intro

- What content do I need to create?
- How am I creating it?

Your content could be the shiniest, most well-made training going around, but if it's created without consideration of your team's learning preferences, habits and interests, it runs the risk of being a total flop.

Planning your content

Before we roll up our sleeves and begin creating content, we have a little more groundwork to do.

The planning stage helps you answer questions around how much content you'll need to design and how you'll resource it.

1 What knowledge am I sharing?

The first step in planning your learning design is to look at what knowledge you need to share through your training, so pull out your learning goals for reference.

Now, consider that knowledge and whether it's best delivered as one piece of learning content, or many. For example, you may be rolling out compliance training around workplace health and safety. Is this best delivered as one extended learning resource, or split up into many? This will depend on your learners, and how they like to learn.

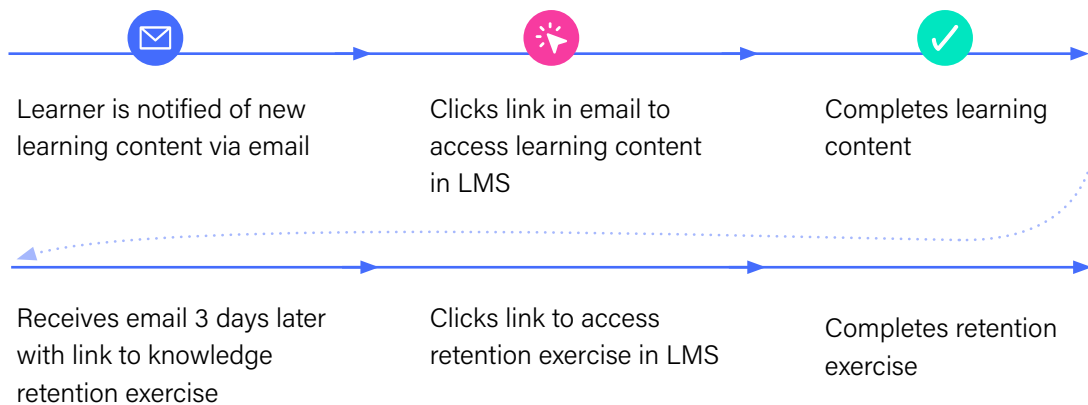
Remember, if you're training multiple groups of learners (as identified by your learner personas) then you'll have multiple learning goals, which may require more learning content or variations of learning content.

2 Where does my learning fit on my learner pathway?

Once you've split your learning goals up and identified how many pieces of learning content you need to produce, it's time to look at where your learning content will sit in your broader digital training strategy.

This is where your learner pathways will come in handy. Take a look at your learner pathways, and identify where in each pathway your different pieces of learning content will sit.

For example, one of your groups of learners may have the following learner pathway:



This is a pretty straight-forward example, but it still illustrates the importance of knowing the context of where our learning content will sit. We now know where our learners have come from before completing the content, and where they will go afterwards, and our design should change accordingly.

You may have multiple learner pathways, and multiple steps that involve learning content - mapping out every step in this journey will give you full clarity on your digital learning strategy.

3 What tools am I using and how am I resourcing my design?

Now that you know how many pieces of learning content you're building and where they fit within your learner pathways, let's look at your tools and resourcing.

As we've discussed, your understanding of your learners should guide your decision on what to use to design your learning content. You may decide that an authoring tool that allows for bite size learning will suit your learners best at that point in their learning pathway. Maybe a large piece

of interactive eLearning would work better. Or, you may look to emerging technologies such as podcasts or interactive webinars.

Finally, you'll need to plan out your resourcing, as you would with any learning design. Who will be creating this content? Do they know how to use the tool that you've chosen? What's the cost and timeline of production?

4 Building a clear picture of design

By now you should have a pretty clear picture of what learning content you're building, where it sits in your training process, and how you're building it. The final step before actually getting into the design stage is to build a clear picture of your design. This means storyboarding out your learning content before getting into the nitty gritty of design.

Designing your content

So, we know how many pieces of training content you need to design, how long it will take and who will be doing it. We also have a rough idea of what it will look like. It's design time!

What is learner-first training content?

So what is learner-first training content? Learner-first training content can be anything from traditional eLearning, to video, to emerging learning technologies such as podcasts and predictive learning softwares. Learner-first training content can be delivered across devices or in person.

Rather than defining a specific medium or method of delivery, it's easier to define learner-first training content by the approach that it takes to the learner.

There are three key principles when designing learner-first training:



Make it interactive

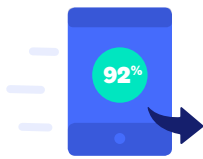
The first principle in designing learner-first training is interaction. In a learner-first approach, training content is something that a learner acts upon, not something that acts upon the learner.

Rather than a one way street, in which the trainer delivers content to a passive learner, a truly learner-first approach is a two way street. Learners must be able to interact both with their learning content, and with their trainer.



Challenge the learner

The second principle in learner-first training design is challenging the learner. Content that requires little mental effort will prove disengaging, whilst content that challenges the learner (both through depth of content, formative assessment and gamification) will improve learning outcomes.



Sharing and extension opportunities

Sharing and extension opportunities are key to a learner-first training model.

Sharing opportunities are pathways that allow a learner to share their knowledge and content completion with others. Sharing opportunities can be baked into learning content (with options to share quiz results midway through a course, for example), or added to the end of a course (via social media sharing links, for example). Certificates are a great way to promote sharing and increase learning adoption.

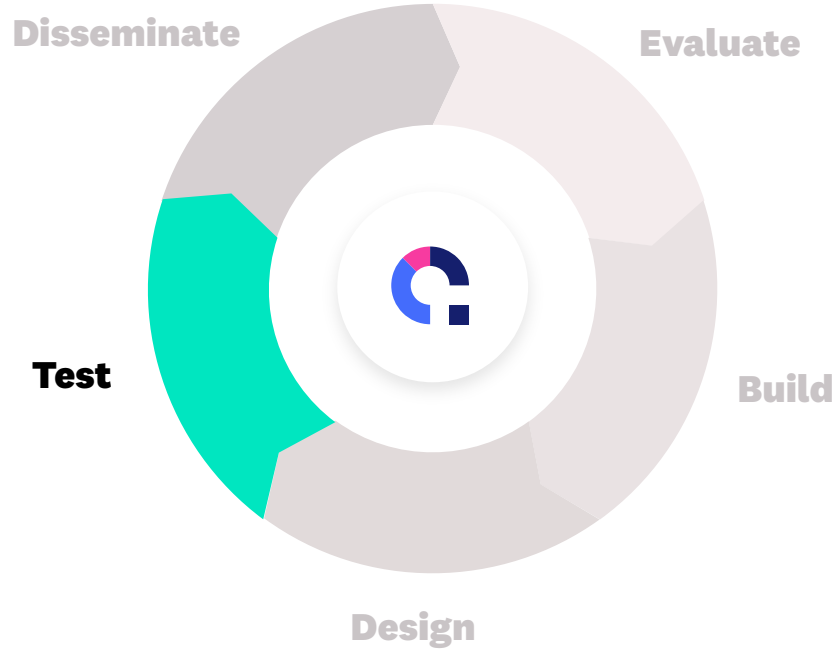
Extension opportunities are pathways that allow a learner to extend their knowledge on a certain topic. A simple extension opportunity would be a link to a video that goes into greater detail on a topic. Another example would be a link to a SME's calendar to book in time to discuss a learning topic in detail. Extension opportunities allow learners to learn at their own pace, and provide them with further learning pathways for topics of interest.

By not only putting great content in a learner's hands, but also letting them delve deeper on topics and themes and giving them an opportunity to share their knowledge with other learners, trainers can add depth and virality to what would otherwise be a siloed learning experience.

Recap

By the end of the design stage, you should have a clear picture of your learners and learning goals, your training structure, and a finished set of training content.

The majority of your training program is in place - now, you just need to implement it.



Test

Intro

- Will my training do what I want it to?

The test stage involves testing your training to ensure that it successfully satisfies your learning goals before rolling it out to your wider learner base. Think of this as a dress rehearsal for your training process!

Testing your training prior to rollout

There are three key questions to ask yourself when testing your training. Let's have a look at them.

What am I testing?

Like any good test, testing your training program should begin with a hypothesis - a measure of whether your test is or is not a success. This hypothesis should be mapped back to your learning goals. Ensure that this hypothesis is falsifiable - that is, you can prove that it is right or wrong.

If your learning goals are to increase your sales team's knowledge of your product, then your hypothesis should be something along the lines of this:

After taking my training program, my sales team will increase their scores on a product-based test by X%



X%

By allocating a quantitative number to your training test through pre- and post-test assessment, you'll be able to objectively measure whether you've hit your learning goals.

This stage is also where you'll define your success metric. Are you aiming for deeper knowledge as measure by improved test scores? Or, are you more focused on improving employee engagement levels during training, as measured by time spent on training content or successful adoption of content? Do you simply want to improve completion rates?

Who am I testing on?

In order to effectively test your training, you'll need to pick test subjects that are representative of the learner base that will be taking your

training. If there are multiple cohorts within your learner base, you'll need representative subjects from each of these cohorts. The easiest way to select representative subjects across multiple cohorts is to refer to your learner personas (if you haven't yet defined your learner personas, here's a guide on how to), and pick samples from each persona group.

What data am I collecting?

The testing phase is not just about proving your hypothesis, but also ensuring that you're successfully gathering data on each step of your training program before rolling it out across your learner base. Consider the data points that you'll need to collect from your training program (for example, course completion rates, time spent on content, individual quiz scores, dropout rates at each stage of your learner pathway) and use your test to confirm that your data points are pulling through accurately for each learner. This is your chance to make sure your reporting is clean and there is no data leakage!

Putting it all together

To recap the above in a step by step process, here's an example of a structured testing process:

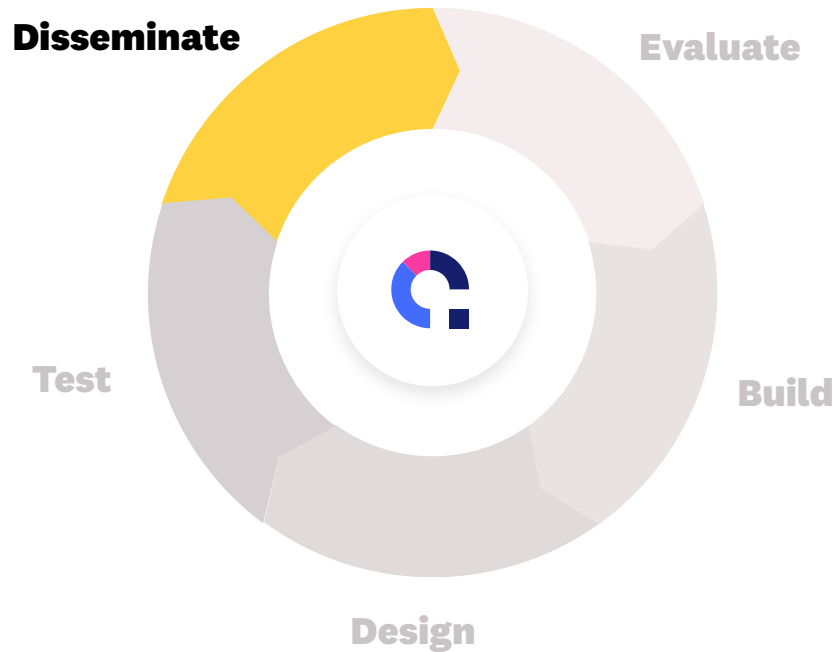
- Decide on your hypothesis and define a measurable metric for success
- Gather a representative cohort (based on your learner personas)
- Conduct pre testing to benchmark your test
- Conduct testing and prove or disprove hypothesis
- Ensure data is clean and accurate, ready for wider dissemination of training



Recap

You've just proven that your training is effective and justified all of the hard work that went into the evaluation, build and design stages.

You're ready for the dissemination phase!



Disseminate

Intro

- How am I delivering my learning content?
- Does my training scale?

The dissemination stage is all about rolling out your training to your learners, and scaling that training over time.

When delivering your training, you'll need to look at your rollout model, tech requirements, timelines and training structure.

Once you've successfully delivered your training, it's time to think about scaling it through automation and integration.

Delivering your training

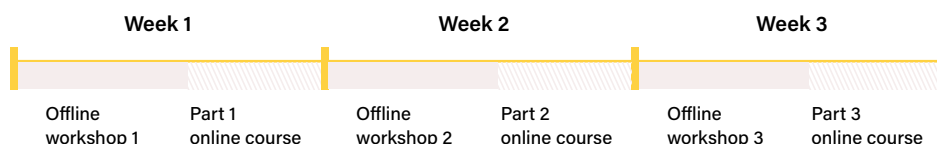
There are four key questions to delivering your training.

What's the rollout model?

The first question to answer when delivering your training program is around your rollout model.

Is training taking place online-only, or are there also offline components? This will affect how you time your training delivery, and how you structure it. If there are offline components to your training program, you'll need to deliver your training accordingly.

For example, if your program runs for 3 weeks, and includes weekly offline workshops, you may want to deliver the online component in 3 parts, with each component released at the end of each workshop.



Is your program a blended learning model, or self-guided? Whilst this may appear to be the same question as online or offline, some online programs contain virtual classroom elements, or other learner-trainer communication sessions such as Zoom meetings, webinars, and live chat sessions. Again, these will affect both the timing and structure of your training delivery, as learner-trainer sessions have to take place at pre-set times.

If your training does not involve any pre-set times or offline components, then will it be a staged delivery, or a bulk delivery? In other words, will you make your entire training program available at once, or will it be drip fed over a period of time?

Is your program a rolling or fixed delivery model?

**A rolling delivery model
looks something like this:**

'An employee can be enrolled in your training program at any time, and has 21 days to complete it from the date of their enrollment'

**A fixed delivery model
looks more like this:**

'All employees are enrolled into your training program at a set date, and they must all complete it by a set date'

Note that not all training programs are rolling or fixed delivery models - some are not time-based at all, and let learners learn at their own pace.

There are no right answers to the questions above - each program will be different. However, it will be far easier to answer the questions above if you've identified your learning goals and structured your learner pathways, as you'll have a clear picture of what your program will look like and thus how it should be delivered.

Is your tech ready for delivery?

Most training programs require a Learning Management System for the delivery and tracking of content. But what other tech do you need? Are you using any integrations, like webinar or video conferencing tools, surveys, or email platforms? Are these set up and properly branded?

By testing your training prior to rollout, you should have ensured that most of your tech is ready to go.

What's your training structure?

This question refers to the grouping and structure of your training delivery.

- Who are your learner groups?
- How are you enrolling them in order to accurately track each group's progress and results?
- Does each group need different content delivery and structure, or can they be served the same resources at the same times?

Your learner personas should tell you exactly who your learner cohorts are and how their training delivery should differ; your LMS should help when actually setting up those cohorts within your program.

Secondly, you'll need to look at your structure on the trainer-side.

- Do your learner groups have the same trainers, or will you need different trainers for each group?
- What are your trainers' permissions - can they read and write content, or just administer training?
- Will they be conducting online or offline workshops in conjunction with your online delivery?
- If so, have you scheduled times for these in-person sessions and structured your delivery accordingly?

What are your timelines?

Now that we've determined your rollout model, ensured your tech is ready for delivery and outlined your delivery structure, let's look at timelines.

- When is the first component of your training (or your entire program, if you're releasing it in bulk) going live?
- Is there a fixed completion date for your program?
- Beyond this round of training, will you be conducting refresher training?

These questions should help you outline a timeline for your training delivery, and add dates and delivery times into your LMS. If your rollout model is fixed or rolling, then you'll need to include content availability dates into your timeline and plug them into your LMS.

Putting it all together

Once you've finished the steps above, you'll be able to set up your content for delivery and begin rolling out your initial training content!

Scaling your training

Scaling is a stage that comes after training delivery is well and truly underway. This ensures that training is only scaled when it's ready to - when you know that the training itself is effective, that no learners are slipping through the cracks in your training process, and that your data is clear and accurate. In other words, training only scales when it's watertight.

1

Automate

The first step in scaling training is to automate as much of your process as possible. Refer to your learner pathways and look at every step that your learners take to complete training.

Keep one question in your mind: **Can I automate this step?**

The first step in your learner pathway may be when a learner is enrolled into the first course in their training process.

- How is this step currently completed?
- Is the learner enrolled manually, or is their enrollment automated based on a trigger?
- Is there an opportunity to provide auto-enrollment, in which the learner signs them self up for the course?

By mapping your automation to your learner pathway, you can guarantee that you've covered every aspect of your training process when it comes to automation.

2 Ensure data clarity

Data clarity is vital to consider before scaling your training. If you're currently missing any data when it comes to tracking and analysing your training, then your gaps in data will be magnified by tenfold when you scale.

Spend some time going through your data and identifying any gaps.

- Are there any areas of your training program that happen outside your LMS?
- Are you tracking data from these areas and feeding them back into your LMS?
- How about the data you're collecting within your LMS - are you storing it properly?
- Can you export it?

Only when your data is watertight will you be able to truly scale training.

3 Integrate

Refer back to your learner pathways, and ask yourself what tools you could be adding to your training process to help scale. For example, you may require your learners to book an in-person session with a trainer at some point in your program. Can you leverage a meeting booking tool (such as Calendly) to help scale this booking process?

4 Re-engage

Scale isn't just about increasing the volume of your learner base - it's also about bringing back old learners to complete more training. Consider how you could re-engage learners who have completed training - or at least, how you could re-engage them in the future.

For example, you may be running a training program to improve emotional intelligence within your organization. Why not capture your learners' emails and re-engage them with an email drip campaign that allows them to self-enroll in short courses to deepen their knowledge and ensure retention of knowledge?

5 Expand your learner groups

To scale further, you'll need to increase the amount of learners in your program. If you're training internally, then consider what groups of learners you could add to your program from within the business. Are there other geographic regions, departments, or functions within the business that would benefit from your training program? You can use the results of your program so far to justify expanding your learner base.

Finally, consider expanding your training outside your business. By selling your training, you could be adding an extra revenue line to your business and capitalising on the time you've spent building and delivering your training program. If you're at a larger business, however, management may want to protect the IP of your training and keep it for internal delivery.

6 Provide sharing opportunities

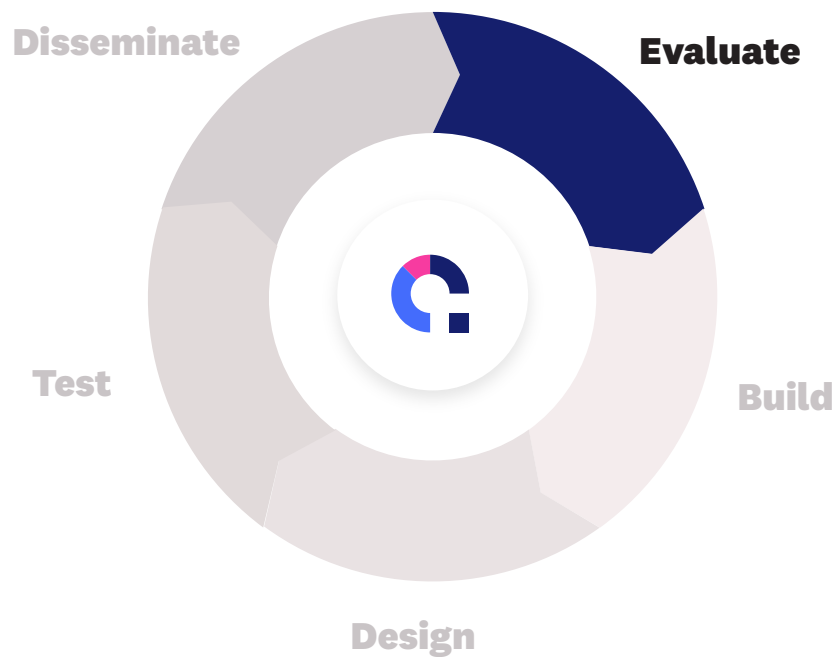
To scale training further, offer your learners opportunities to share that they've completed your training program. Badges and certifications that can be shared on social media or via internal emails and chat will act as a word of mouth marketing channel for your program, spreading awareness of your training and attracting more learners.

Recap

You've created an awesome training program based around your learners. Your content has been delivered, and you've begun to automate it and introduce it to new learner bases.

Job done?

Almost! We've come full circle, and are back at the evaluation phase.



Evaluate

Intro

- Did I achieve my training goals?
- How can I improve?

Finally, we're back at the evaluation stage again.

The final evaluation stage involves measuring the success of your training, including how to measure that your training is actually being applied in the real world (beyond just LMS completion rates), and how to set up impactful reporting that feeds back into improving your training strategy.

Evaluating the success of your training

The power of evaluation

Evaluation is a critical stage in any training process. Without clear, actionable evaluation, there's no way to know whether your training has been a success. This means that you can't improve future training, you can't explain the power and importance of your training, and you can't tie your training to business outcomes.

In comparison, great evaluation will allow you to see exactly where your training is succeeding and failing, and take steps to make it better. It will also allow you to show the rest of your business how powerful your training has been.

There are **four key questions** to ask yourself when evaluating your training:

Question 1: How will I know if my learners learnt anything?

The first step in evaluating training is understanding whether your learners have actually taken on the knowledge that you've shared.

This may sound pretty obvious, but it's not as simple as just looking at your learners' completion data.

Look back at your learning goals. What knowledge were you looking to share with your learners?

Now, tie this to a measurable outcome. This will probably be the same measurable outcome that you chose to use when testing your training prior to rollout.

To recap, if your learning goals are to increase your sales team's knowledge of your product, then your measurable outcome should be something along the lines of this:

After taking my training program, my sales team will increase their scores on a product-based test by X%



By allocating a quantitative number to your training test through pre- and post-test assessment, you'll be able to objectively measure whether you've hit your learning goals. Choosing an outcome that looks at actual results, rather than just completion data, will give you a better idea of how successful your training was and which of your groups had the best success.

Remember that unless you're running accreditation or compliance-based training, completion data probably won't cut it - define your success metric, make it measurable, and keep it as your North Star for evaluation purposes.

Question 2: How will I know if my learners applied their learning?

Too many trainers complete the step above and end their evaluation process - after all, they've measured whether their learners have understood their training, and that's what determines the success of training, right?

In most cases, successful training outcomes are a little more complex than that. Real-world training isn't just about sharing the knowledge you need to share - it's about having learners apply that knowledge. To revisit our example above, what's the point of your sales team understanding more about your product if they don't then apply that knowledge?

The second step in building a solid evaluation process is evaluating the application of knowledge. To do this, you'll need to monitor the behaviour of your learners and analyze measurable data on their performance post-training. This will probably require stepping outside your Learning Management System and into other areas of the business.

In our example above, you may want to monitor the close rate (also known as the conversion rate) of your sales team - does it increase following your product training program? Or, you may want to monitor feedback from leads interacting with your sales team - are they reporting that your sales team has greater product knowledge following your program? If so, you can demonstrate that your training was successful.

Knowledge is often applied in ways that you may not imagine. For this reason, try to monitor as many of the data points on your learners' performance as possible.

If you have the luxury of rolling out your training in stages, consider splitting your learner personas into control and test groups to better isolate the effect of your training on performance. For example, you could split your sales team into 2 similar groups, deliver training to one group and not the other, and measure the performance of both groups after your training has been delivered. Did the group who underwent training have a better close rate? You'll be able to separate the effect of your training from other factors that could be affecting performance.

Question 3: How will my learners know if they were successful?

Evaluation doesn't just happen on the trainer side. Great trainers ensure that their learners have a clear understanding of how successfully they completed their training, and how they could improve in the future.

Ensuring your learners have access to their learning results is a good start, but also consider how you will provide context to help them evaluate their success, and how you will engage them to view their results.

Providing context will allow your learners to better understand how well they completed their training, how to apply it, and how to do better next time. You can provide context to learners through mechanisms like trainer feedback alongside their results, but also through more engaging methods, such as in-person sessions with a trainer or manager to run through results and how to apply training, or a social chat room for learners to digest their performance. Giving learners access to the cohort average when viewing their results will also allow them to contextualize their success.

Making learning results available to learners is critical, but you'll also need to engage them to ensure that they actually view those results. Consider how you'll notify your learners that their results are ready, and how you'll display those results to them. If you've identified your learner personas, then referencing those personas will help you understand how your learners want to be engaged and what will motivate them to evaluate their success.

Question 4: How will my designers know if learning was successful?

Evaluation is most powerful when it acts as a feedback loop, positively impacting future training. One way to ensure that this feedback loop is happening is to include your learning designers in your evaluation process.

Consider what metrics will be important to your learning designers - for example, you may want to couple measurable training results with engagement metrics like time spent on content - and make them available to ensure that future training design is built off key learnings from your current content.

Putting it all together

Let's recap. You can now:

- Measure that your learners successfully took on the knowledge you needed to share with them
- Measure that your learners then applied that knowledge to deliver real-world business outcomes
- Share training results with your learners to boost engagement and future training performance
- Share training results with your learning designers to improve future training content

Let's take a look at how to set up your reporting in line with the points above.

Setting up your reporting

Reporting comes in many different forms.

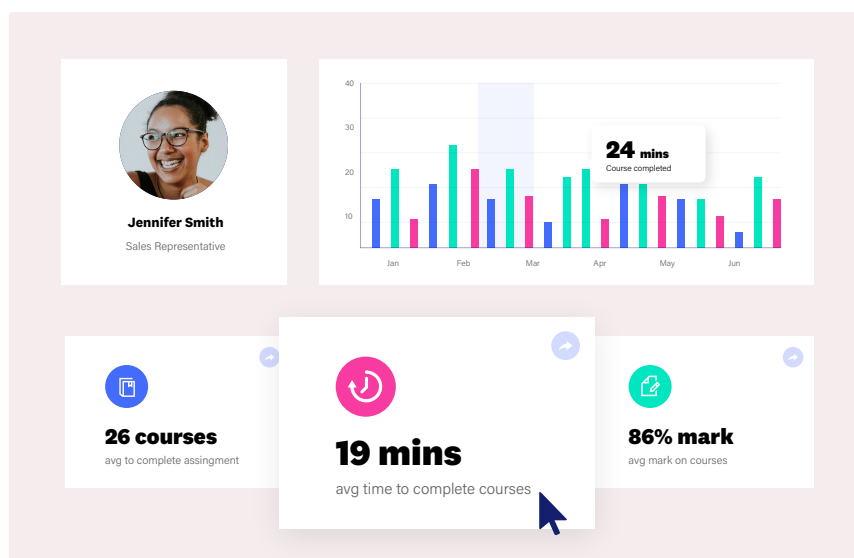
You can report from inside your LMS, or export reporting to a third-party system. You can report on metrics big and small, tie reporting to expenditure and business outcomes, and share reporting with multiple functions inside your organization. The way reporting is set up is dependent on what you want to track, what technology you have at your disposal, and what your business requirements are.

For that reason, it's hard to give a step by step guide to setting up reporting - the best reporting is adapted to specific conditions. Instead, here are some key principles behind great reporting setups.

Easy visualisation means easy evaluation

Representing your data through at-a-glance dashboards and charts will allow your trainers and management to instantly see the success of your training programs without having to spend time pulling together reports and spreadsheets.

Most Learning Management Systems have at-a-glance data visualisation, but if yours doesn't then consider what platforms you could integrate with to improve your data visualisation capabilities.



Real time data allows for faster, better decisions

Having data that updates in real time becomes critical as your business scales.

Real time reporting will allow you to make quicker, better-informed decisions when it comes to your training. If most of your reporting is happening within your LMS, then real time reporting is fairly easy to achieve.

However, some reporting and evaluation may happen outside your LMS - in that case, you may need to enlist some technical support to ensure external reporting happens in real time.

Granularity leads to insight

Whilst it's essential to have data that can be quickly and easily digested visually, you'll also need to be able to drill deep into your data to answer more complex questions around your training.

For example, you may have identified a problem with a certain cohort's engagement rates. How deep can you dive into your data to explore the cause of this problem? Can you see individual learner actions within your training, and the time those individuals have spent on specific screens and tiles? Or can you only see a top-line overview of their quiz scores and total time spent on a resource?

The more granular you can get, the better you'll set yourself up to mine your data for powerful insights.

Integrate your reporting for a single source of truth

A lot of trainers have their reporting data siloed within their LMS. In most cases, however, an LMS cannot capture all the data you'll need to properly evaluate the success of your training.

For example, how are you testing if your training is being applied? If you have a sales team completing a sales training program, you'll want to know that their close rate is increasing as a result of your program - your LMS won't be able to capture this information.

As such, integrating your data to ensure that you can view all of your reporting metrics in one place is essential, especially as your training process scales.

Ensure that your LMS has integration capabilities - if it doesn't you may need to consider switching LMS.

Make reporting accessible to key stakeholders

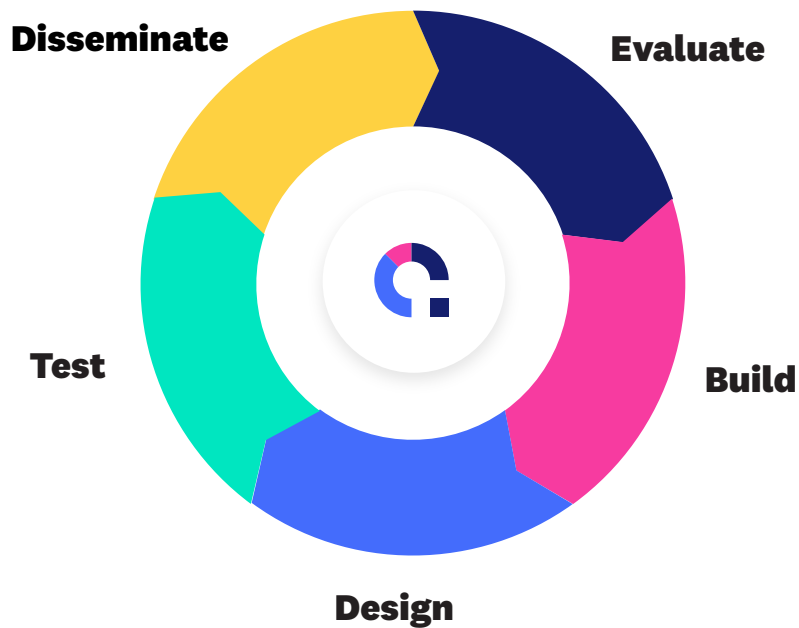
Finally, the accessibility of your reporting is also key. The power of reporting comes from its ability to positively impact and improve future training processes - and to do that, you'll need to put your reporting in the right hands.

Reporting will be accessible to training staff, but expanding that accessibility to include your learning design team will allow them to see where their training content was successful, and where they could improve their design for future content.

Making reporting accessible to your learners is also key, as it will allow them to evaluate their own learning and improve future training performance.

Finally, making reporting available to upper management will let them see the power of training within the business.

And remember - reporting is only as powerful as the actions and changes that it leads to, so use your reporting to make positive changes to your training over time.



Recap

You've planned, structured, implemented and analyzed a training process that's tailored to who your learners are and how they want to learn.

You've done it!

Almost.

There's a reason we display the learner-first training model as a wheel - it's because the best training models are constantly learning from themselves, adapting into better and better training.

So use your evaluation to adapt, adjust, and re-evaluate. Don't rest on your laurels. Your learners change over time, and if you keep evaluating and adjusting, you will too.

And the result?

You'll have the best darn training program in town.

A final note



The learner-first training model involves some serious groundwork, but in the long run it pays off.

Learners receive training that's been tailored not just by way of content, but by also by delivery method and training model.

Trainers have a comprehensive understanding of their end goals, and can easily explain the importance of training to their business.

Training continues to improve over time, and never loses sight of the most important aspect of any training process: the learners themselves.