

17 ESSENTIAL TIPS FOR L&D PEOPLE

The critical
things L&D
people need
to be paying
attention to

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PEOPLE ALCHEMY



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Introduction

A friend of mine moved from a general HR role into one specifically focusing on Learning and Development. She knew I spent a lot of time working with and speaking to L&D people from many different organisations in both the public and private sector, so she asked me 'What should I be paying attention to so that I am successful in my new job?'

It sounds like a simple question, but the more I thought about it, the more I realised the answer was not just repeating what most L&D people have as job descriptions. There was more she needed to know.

And that is how this little book came to be.

I am pleased to say that she is loving her time in L&D, where she feels as if she is making a much bigger difference than before, and what she does really matters.

She is doing well and I would like to think that these tips I gave her when she started got her off on the right foot and helped her focus on the things she needed to do to be successful. I sincerely hope they help you as well.



Paul Matthews
CEO, People Alchemy (September 2011)

Introduction to 5th edition reprint – September 2021

When we ran out of the earlier print runs, I took the opportunity to revisit the tips before we did a reprint. I updated many of the tips and added a couple more because my thinking has evolved over the last few years as a result of my conversations with countless L&D people around their challenges and their goals.

Since I first wrote these tips, I have published three books: *Informal Learning at Work*, *Capability at Work* and *Learning Transfer at Work*. The research for these books has helped me understand a lot more about what is important to L&D, and perhaps more critically, what is not seen as important, but should be.

Informal Learning, Capability/Performance and Learning Transfer are three rather large elephants in the room of many L&D meetings about learning interventions, especially when people are talking about training. That is changing, but often not fast enough to salvage the 'brand' of L&D in many organisations.

These tips will help you get it right.

It is an exciting time to be in L&D – seize the opportunities!



Paul Matthews

CEO, People Alchemy (September 2021)



What is the vision of the organisation and the strategy to achieve it?

Knowing where the organisation wants to be and how it intends to get there is where you start. It is the **ONLY** place to start from when thinking about what you need to be doing.

Every time you have a question or concern about what you are doing or why you are doing it, come back to the fundamental driver that should be behind every activity within the organisation: where is the organisation trying to get to, and how is it going to get there?

What does success look like for the organisation, and how do the employees feature in that successful picture?

Now think about your role as an L&D professional and how you contribute to that vision.

Of course, you should pay attention to your job description, but ultimately you are responsible for helping people within the organisation develop their knowledge, their skills, their attitudes, and their competence so that they can contribute to the vision and complete the journey.

The journey is made up of the operational and strategic business plans that are created out of the vision. What are these plans and therefore what is the journey?

Here is another way to look at it. What do you think your job is? If you are not clear on this, then ask. The person to ask is the person who guides the vision, because your job is a



crucial part of that vision becoming reality. Without people who can achieve the vision by successfully executing the operational plans, the vision is doomed to fail. Your job is to ensure people have what it takes to step up to the mark and succeed in making the vision a reality.

Establishing the vision is not a one-time task. It will change over time as the organisation responds to the market, to regulations and to having different people at the helm.

As you follow the vision, you will be developing your own L&D strategy, which will allow you to develop some specific plans to fulfil that strategy.

Once you have some plans in place, you can start looking at costs. What budget is required to do what is needed? If the budget is not available, you need to seek a budget increase and have a good business case for doing so, or you need to change the board's expectations of what employees will be capable of, so they can feed this back into their own planning.

And once you have a green light for your strategy, how can you measure progress? What indicators will tell you that you are on track, or off it?



What behaviours are needed from employees to take the organisation on this journey?

- > What do people need to actually do? What behaviours do they need to exhibit? What skills or attitudes are required for those behaviours to become second nature?
- > How do these need to change over time?

The vision will be a progressive view of the desired future for the organisation. It won't suddenly manifest overnight. You start from where you are and embark on the journey. People will need to develop skills during the journey. What is required now to get going may well be different from what will be required in five years' time, when the organisation will likely be very different.

Put your focus on behaviours, because it is people doing things that gets tasks done. Sounds obvious, but many people in L&D focus only on knowledge and skills. People knowing things does not get tasks done. Action does.

Focusing on behaviours gets you thinking about performance and results, and the people who pay your wages care about results.

They care much less about what people know.



What is the gap between the current skill level and attitude, and required skill level and attitude?

- > How big is the gap?
- > How will that gap change over time?
- > What happens to the gap if L&D continues doing what it is currently doing?
- > What changes to skills and attitude are required now to get the organisational strategy rolling?
- > What changes to skills and attitude are required in L&D itself?
- > Then what changes are required over time to continue to fulfil the organisational strategy?

Remember that L&D is not just training – it encompasses anything that develops people, so they can perform better at their jobs, and are competent to do what needs to be done. This is definitely not restricted to just job-based skills.



What stops people doing their jobs well?

If there is a performance or productivity problem because people are not doing their jobs, or not doing them well enough, what is stopping them?

Is it ...

- > Lack of knowledge?
- > Lack of skill?
- > Wrong mind-set or attitude, or disengaged?
- > Lack of physical or mental abilities to do the job?
- > Something missing such as a tool, a spare part, the right software?
- > Inefficient incentive schemes?
- > Blame or other toxic cultures?
- > Faulty systems or procedures?
- > ????

To find out what barriers are in the way, ask 'What frustrates you about your job?' and then ask 'What are you tolerating now that used to frustrate you?'

See my book *Capability at Work* for a performance diagnostics tool that will help you answer the above questions.



paul-matthews.com/capability-at-work/



If a department requests training to solve a problem they have, make sure it can actually be solved by training

You will be familiar with the situation where an operational or division manager has some issues in their division. It is easy to blame staff inadequacies for the issues, so the knee-jerk response is to throw training at the staff because there is something 'wrong' with them.

Before agreeing to provide training, find out more about the problem and the root cause. Lack of skills or knowledge may be a part of the picture, but it could be that existing systems are hampering staff, or they are incentivised in a way that promotes the wrong behaviour, or any of a hundred other things.

If someone asks for training, ask them what problem they are seeking to solve. Then work with them to determine if training will solve the cause of the problem, or if there is some other cause or obstruction that needs to be fixed first.

This is where you exhibit your first-class analytical and problem-solving skills, and of course trust and rapport skills with the person asking for the training, because they or their close colleagues may be the root cause of the problem.

Find out who is involved because the best place to find the answers is the people doing the job, so get out there and speak to them. Find out why they are not meeting objectives, and ask them for suggestions on how they could meet the targets.



Do they know they are performing below the required level? Do they know what is expected? Do they care? Do they have a better idea of what the goals and targets should be? Do they understand how what they do fits into the big picture of the vision?

What is stopping them being capable of doing what is asked of them? What is the first thing worth trying as a solution?

What is the cost of doing nothing versus the cost of fixing the problem?

If you do allow training to be thrown at a problem without first determining if the problem can be solved that way, then you run the risk of the problem continuing and you being blamed for providing inadequate training.

The full process for this performance consultancy is in my book *Capability at Work*.

 paul-matthews.com/capability-at-work/



Be aware of the political landscape.

Is training and development seen as a cost or an investment?

- > How is training viewed within your organisation?
- > Is it only seen as a solution if it is done right?
- > Is the L&D department blamed when a training intervention does not work to solve a problem?
- > Does the organisation really want to invest in its people, or is this just rhetoric and there is a short term view of keeping costs to a minimum to meet shareholder short term expectations or government budget targets?

If an organisation could stay as it is, successfully churning out the same widgets, or the same service, and there is no staff turnover, then perhaps learning and development would not be needed. But we know that is not possible in this rapidly changing world.

Every organisation must respond to change by undergoing change. It must change methods, technologies, location, organisational structure, and people will come and go. Change is constant, so there will always be a need to develop people to keep up with the internal change that is responding to the external changes.

If L&D is seen as an unavoidable cost, perhaps you need to reframe this. In a constantly changing world, learning and development can be a strategic advantage, so this is how it needs to be seen by the board.



Find case studies of successful organisations around the world that operate in similar contexts to your own. What do they spend on learning and development as a proportion of their turnover or total budget? And how do they get best value from that spend?

Start thinking about the organisation in business terms with a business mindset. Look at the organisation through the lens of the shareholder, the entrepreneur, the senior manager, the board member, the customer and any other stakeholders. Learn to speak with senior business people in their language and with their perspective. Let them see you as an ally in their never-ending battle to keep the organisation functioning effectively in a chaotic world.

They are well aware of the critical impact of learning, skills and knowledge on the business. Just ask them about the impending brain drain when the baby boomers all retire. Ask them what would concern them most if they had to offer exit packages to reduce employee levels. They know that the knowledge that walks out the door when experienced people leave is a crucial nutrient for the organisation.

They don't need to be convinced that learning is important, but they often need to be convinced that L&D as a department can contribute effectively because so much of the training that has been done in the past has had lukewarm effects at best.



Get clear on how people currently learn what they need to know to do their jobs

- How much of their direct job-related knowledge is down to formal interventions such as classroom training and mandatory eLearning?
- How much is learned from colleagues?
- How much is learned through self-directed discovery?
- Does the 70:20:10 model seem to apply? If not, what are the proportions for your own organisation?

Note – 70:20:10 is a reference model or framework. It is not a recipe or a rule. It is a way to categorise learning in the work place and the ratio seems to hold quite well over many contexts. The model posits that 70% of learning is experiential, 20% is social and 10% is formal/scheduled/planned.

Get out there and ask people how they get to know what they need to know to do their jobs. Notice how the answers differ between departments, job grades and lengths of tenure.

Remember too that people will usually say what they think they should say, or what they think you want to hear. It might seem to them to be a good thing to answer with 'look it up on the company intranet' but if they don't actually do this in practice, the information you are getting is not useful.

Pay ongoing attention to how people learn over time, because it will shift during periods of change within the



company, such as when a new factory is opened, or new systems introduced. And I hope that people also change the way they learn for the better as a result of changes that you have instigated as the learning and development professional.

So many L&D people, despite so much evidence to the contrary, behave as if the only real learning that takes place is the formal learning. This is partly because that is the part of learning they can most easily and directly control. It reminds me of doctors who studiously ignore cases of spontaneous remission in patients because they did not prescribe the magic pill to cure them, so in some ways to them, it isn't 'real'. Doctors don't seem to do much study of spontaneous remission. Why not?

Most learning emerges from contexts within the workflow where it is both suitable and applicable. Find out how this on-the-job learning happens in your organisation, because this informal learning is the real key. It is better to be aware of informal learning so you can leverage it and harness it, rather than ignoring it because you didn't initiate it.

See my book on *Informal Learning at Work*.

 paul-matthews.com/informal-learning-at-work/



Find out how people would prefer to learn

Once you have a good handle on how people are currently finding out and learning what they need to know, ask for suggestions on how they would prefer to learn.

But be careful, because they will automatically assume you are talking about training. And they often like training courses. They get to be away from their desk for a day, chat with colleagues and have a nice lunch on the company.

Also, people do so much learning yet don't think of it as a learning experience, that when you ask about learning, or use the word learning, they have a very narrow interpretation of what you mean by that. You need to take the wider view of all learning in all situations.

So remove the word 'learning' from your vocabulary when asking people how they prefer to 'find out' or 'solve issues' or 'get better at'. It seems counterintuitive, but you will get much better information and feedback this way.

Another pitfall is that people may not know all the ways they can find out information, so people not getting information a certain way may only mean they don't know they can. People don't know what they don't know. Henry Ford is reputed to have said 'If I had asked people what they wanted, they would have said a faster horse'.



Get involved early on in change programmes

- > If the company is going through a re-organisation, or any kind of change programme, such as new factory equipment or a new enterprise software system, get involved early.
- > All too often, employee development to help cope with the changes is an afterthought.
- > Be proactive in making staff development an integral part of any change programme.
- > Ensure that sufficient budget is put aside for any staff development needed to cope with the changes.
- > Ensure that there is sufficient time in the change project plan to deliver the staff development needs.
- > Ensure there is sufficient support on hand for employees who may struggle with a new system or new way of doing things.

So bang on the door of the project office and demand to be let in! Without you – and without developing staff to cope with the change – the programme is going to struggle to meet its objectives. You are a crucial part of any change programme and you need to be right in the middle of it.



Get the line managers more involved in supporting learning and development

- › Your biggest assets AND biggest liabilities when changing skills and attitude are the managers of the employees.
- › The managers need to be fully invested in all learning initiatives as their support can make or break them.
- › Find some way to hold them accountable for the programme outcomes.

To do this, you need to get their input into the programmes so they have had a say, and can see that the programme goals are useful for them.

Managers have a huge impact on how people learn on the job and this is often down to the manager's own attitude toward learning.

A friend of mine suggests that line managers should be considered an extension of L&D. Without them on your 'team' it is virtually impossible to make a difference.

So, spend time with the line managers and discuss how you can work with them to get the best from your development programmes. After all, it is to the line managers' advantage in the long run.

Develop a consultative approach when talking to the managers. In effect, you are a performance consultant helping them ensure their team can, and do, perform.



Teach them about informal learning and the 70:20:10 ratio model. Explain how this is good news for them as they are right there with the learner, so they are in a great position to influence the 70%. They should grab this opportunity with both hands and realise how big a role they play in how their people learn, and what their people learn in the workplace. Help them understand that their people will always be learning, so make sure people are learning the right things.

For example, if the system does not work well, then people will learn to bypass or ignore the system. If required information is not readily available, people will learn how to cope without the right information. In both cases you will probably get sub-standard results. It is up to the managers to get the system right so that people learn the right ways to do things, and up to the line managers (and you as the L&D person) to make sure the right information is readily available when it is needed so that people have the tools for doing the job right.

Getting line managers to coach rather than tell is crucial to helping them help their team members to learn and grow. One of your priorities may therefore be to develop coaching skills and to foster a coaching/ mentoring culture.

Also teach line managers about Carol Dweck's fixed/ growth mindset model. If you don't know about this, read her book, *Mindset*.



What knowledge is essential and requires a formal approach with assessment?

You can't escape this stuff, whether it's knowledge about money laundering, food hygiene or health and safety.

Since you have to put people through a process to bring them up to a standard on the mandatory knowledge anyway, how can you add to the process to include other things that will be valuable?

Getting people to answer a questionnaire successfully is not enough. They must also behave in the right way and put the mandatory requirements into action. Focus on behaviours. An employee who messes up because the organisation turned a blind eye to the incorrect behaviours won't protect the company from the courts just because they passed an exam.

Treat this mandatory stuff as an opportunity rather than an inconvenient necessity.

Perhaps you can add material on customer service or patient interaction, or product knowledge, or how your company approach is better than your competitors'.



Measure ROI as well as you can

ROI is what the board will pay attention to.

- > That and how the intervention will move the organisation towards the vision.
- > Make as direct a connection between L&D initiatives and revenue and/or efficiency or decreased costs as possible.
- > Just because something is difficult to measure does not mean you ignore it.

Do ROI projections **before** doing any L&D interventions, then track your success in meeting those projections. In other words, 'start with the end in mind'.

Make friends with the people in the accounts department to get as much hard data as you can, and to get their help in estimating those figures where there are none. Your ROI calculations carry much more clout if Finance has been involved.

Doing a full set of cost projections before you start will also allow you to compare different types of intervention in terms of overall costs and likely impact. There are many ways to provide L&D programmes, not just training. Which ones will work best for you in terms of ROI?

One simple way to demonstrate ROI is to require employees to do a mini-project as part of their training programme. Each mini-project is assessed for ROI by their line manager. Add up all the mini-project ROIs and you have a concrete and provable return that would not have been there without the programme.



Follow up formal training because that's where the real value is – not so much in the training itself

Formal learning interventions based on classroom training must be spread over time. Think of it as a programme rather than an event.

- > Make sure that everyone involved is prepared
- > Then do a great job in the training room
- > Proactively manage learning transfer
- > Measure the changes you have achieved

You know how it is. You spend lots of money on training. The delegates are all fired up and making promises to themselves, and to you, to do this and change that

And then they go back to their desks and their overflowing in-box kidnaps their attention. After a few weeks or months, the fading memory of those new tools and skills hardly ripples their thoughts as they go about their daily tasks. For many delegates, their performance is remarkably similar to what it was before.

There is no one thing you should do for learning transfer, there are lots of things. You need to design a variety of ongoing activities into your learning programme to keep the information alive for the delegates, and so that they are encouraged to use what they learned and embed it into their working days. Until it is used, it is just information. Until it becomes habit, or 'The way we do things here', it can fade.



So how long is a learning programme? If it includes a one-day workshop, you might say it is a five-day programme spread over five months, one day of which happens to be in the classroom. Ensure that everyone concerned is aware of the work and time required to embed the learning following the workshop. If you tell them it is a one-day workshop, in their mind, all they will release is one day of time.

Ensure that somebody supports and holds the delegates accountable for doing these follow-up activities. In most situations this should be their line manager. And then ensure that you have a way of supporting those managers, and also holding them accountable for doing their job.

Make sure there is an item in every line manager's job description that requires them to develop the people on their team, and make sure they are aware this is a core part of their job.

All this can be a lot of work, especially at scale, so you will probably need to look into using a Learning Transfer Platform or LTP.

See my book on *Learning Transfer at Work*.

 paul-matthews.com/learning-transfer-at-work/



Get the marketing department's help when publicising initiatives such as intranet resources

A lot of L&D interventions require a strong internal sales pitch to get buy-in and usage. The marketing people know how to promote ideas and get buy-in (as they should!), so enlist their help for your internal sales job.

You have an audience and you want to sell them the idea that they should take some kind of action. Think about it from a marketing perspective. Still better, do this with a friend or colleague who is in marketing.

Let's consider marketing an intranet resource . . .

- > Divide your audience into segments depending on things like location, seniority, need for the intranet information and so on. Ideally you will end up with segments that have a similar relationship with the information on the intranet. People can belong to more than one segment.
- > Think about what you specifically want the people in each segment to do.
- > Think about what benefits would be available to them if they were to take the action you want them to, and access the intranet.
- > Think about how these benefits translate into desired results for the people in each segment.



- > Now you need to promote these results and benefits to your target segments, maybe starting with one segment. The promotion needs to make it crystal clear to them what they will get as a result of taking the action you want them to take. They need to see compelling value in doing what you want, or they won't do it.
 - > Measure the kind of response you get to each marketing initiative, so that you know what works and what does not.
 - > Keep going! Heinz never stops advertising baked beans.
- Learn about sales, marketing and internal communication. These skills will serve you well in L&D.



Lower the barriers between employees and the information they need to do their job

People can learn huge amounts of information, but the amount of information available is growing incredibly rapidly. No one can ever know all that they need to know.

So they must find it when they need it. People need knowledge and information when they need it, which is RIGHT NOW. Long gone are the days when we could remember everything we needed to know to do our jobs.

Make it easy for people to get the information they need, be it online or via smart phones, or from acknowledged experts within the organisation.

Find your internal subject matter experts and thought leaders, and nurture their co-operation.

Make sure you have suitable reference materials available, so they can find what they need to know quickly.

It is all about the right information, at the right time, in the right format so they can do their job, solve their problem, take action, and move on to their next task.

In so many cases, the barriers between employees and the information they need are too high. Find out what the barriers are, and remove them.

This will help people to help themselves rather than sit helplessly and wait for a training programme. Ultimately, learning is something that people do for themselves. You cannot 'deliver learning'. However, you can set up an



environment where people can learn more easily, where the barriers between them and what they need to learn are low.

Barriers can consist of things like . . .

- > Not knowing a resource exists
- > Knowing it exists but not knowing where to find it
- > Finding it but being unable to read it easily due to the way it is formatted or structured
- > Being unable to use it because it is impractical or academic and does not directly refer to the work context
- > Being overwhelmed by how much they get rather than just a bit they need
- > and many more.

Ask people what stops them using existing resources. You will be surprised at how even a simple thing like font size or colour can significantly impact upon readability, comprehension and how willing people are to bother reading something.



What do people think of you?

Work on the image of the L&D department to make sure it is seen as adding real value to the organisation. ROI is important to the board, but what about the rest of the people within the organisation? They are not so much interested in ROI as in what the L&D department can do for them at an individual level and in helping the organisation be a good place to work.

What is the brand of the L&D department? What do people in the organisation say about it when you are not in the room? What would you want them to say about it? Would you want them to use words and phrases like 'innovative', 'ahead of the game', 'solutions-focused', 'sensitive to both personal and business needs', 'essential to success', 'critical part of the team', 'people apply to work here because of the staff development opportunities'?

It's not so much about what you do, or could do, but what people think you do.

How can you change people's perceptions of the role and value of the L&D department so they align with what you want it to be?

Go to your friends in marketing and talk about the brand of L&D.

If your brand is wrong, it will greatly hamper your ability to make an impact in the organisation.



Get good at building relationships

So much of what you do is about relationships with people at all levels within your organisation, and with suppliers outside your organisation.

Draw a relationship diagram that includes all the stakeholders you need to deal with. And even do a smaller stakeholder chart for each project. By the way, you should get good at managing projects as well.

What do the stakeholders want? What do they expect? How much power/influence do they have over you and over the project? How important is their input to the success of your project?

To draw your stakeholder chart, put yourself in the middle, and draw lines out to the stakeholders. Use colours (red, amber and green) and symbols to designate power and whether the relationship between you and that stakeholder is good enough to support the project. Look for weak relationships that could cause problems, then fix them.

Nurture and build relationships with people of influence within the organisation. You never know when you will need them.

Conclusion

You can think about your success in simple terms . . .

If an employee can step up to the mark with the right attitude and with the right tools and skills to do the job, then you have succeeded.

I speak to L&D people every day, from small organisations to global ones, and across all sectors. There are common themes in terms of the challenges L&D people face and the way that forward thinkers are successfully tackling those challenges.

I am learning more every day, so if you have any questions, send me an email and I will be delighted to share what I have discovered.

I wish you every success.

My best wishes,



Paul Matthews

Founder and CEO of People Alchemy

About Paul Matthews



Paul is a recognised expert in the field of organisational Learning & Development and the author of three books on L&D.

He is a speaker, consultant and author whose background as an engineer and his natural curiosity give a unique edge to his work. He grew up on a hill country farm in New Zealand and later, like many Kiwis, travelled the world. Paul's preference was travelling well off the beaten track and this has resulted in some fascinating stories that bring his talks and keynotes to life. He climbed Mt Kilimanjaro twice, crossed the Sahara three times and the Himalayas eight times.

Paul founded People Alchemy Ltd in 1999 after a senior corporate career and the company now specialises in online learning software.

20 years after moving into L&D, Paul is a sought-after speaker on the international stage – not only for his undoubted knowledge but also for his engaging, story-led approach and his desire to make L&D ideas easy to understand. He runs workshops and does consultancy for many blue-chip clients in the UK and beyond.

Perhaps he can help your organisation's L&D be more effective?

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I do hope you have found these 17 tips useful and thought-provoking.

Which tips caused you to stop and think, and which ones do you already do well?

I would love to hear.

There are more free guides and tips at

 paul-matthews.com/downloads

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What current L&D problem can I help you with?

Let's talk about it :-)



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Paul is the CEO of People Alchemy, so if you are interested in leading-edge online learning tools visit. . . .

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