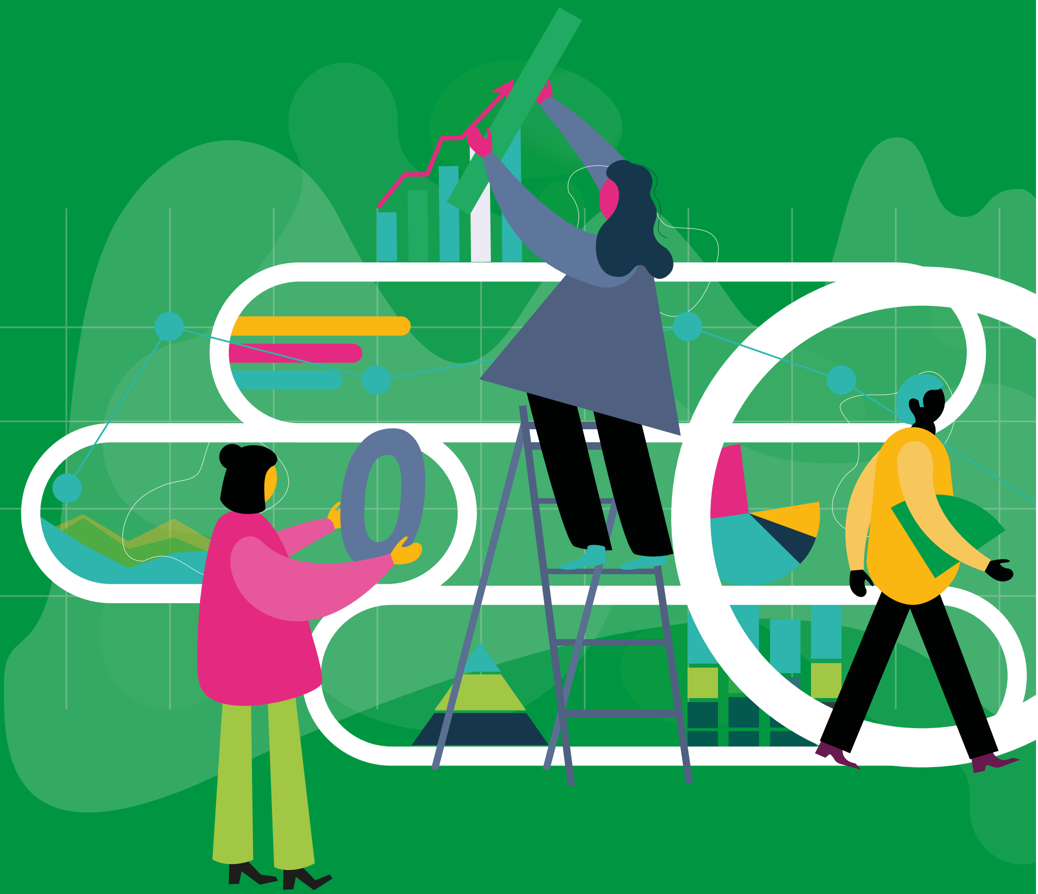


Recipe for Success

Our formula for creating dynamic custom learning

The Kineo Recipe for Success

What is it that makes the experience of designing learning with Kineo so great?

We've worked on a host of industry-leading custom learning curriculum and, at the risk of giving away our secret sauce, we're going to share the framework for our proven process.

This guide will uncover the learning recipe that helps our clients across industries, and hopefully spark ideas about how you can improve your own learning processes. These steps can be applied to everything from how to get the best out of a kickoff meeting to creating a great script. They can even assist with learning design and overall project review. We'll walk you through our best practices for successful custom learning projects to help you hone your own process.

1.
Create
a project
charter

2.
Know
your
audience

3.
Define
performance
goals and
barriers

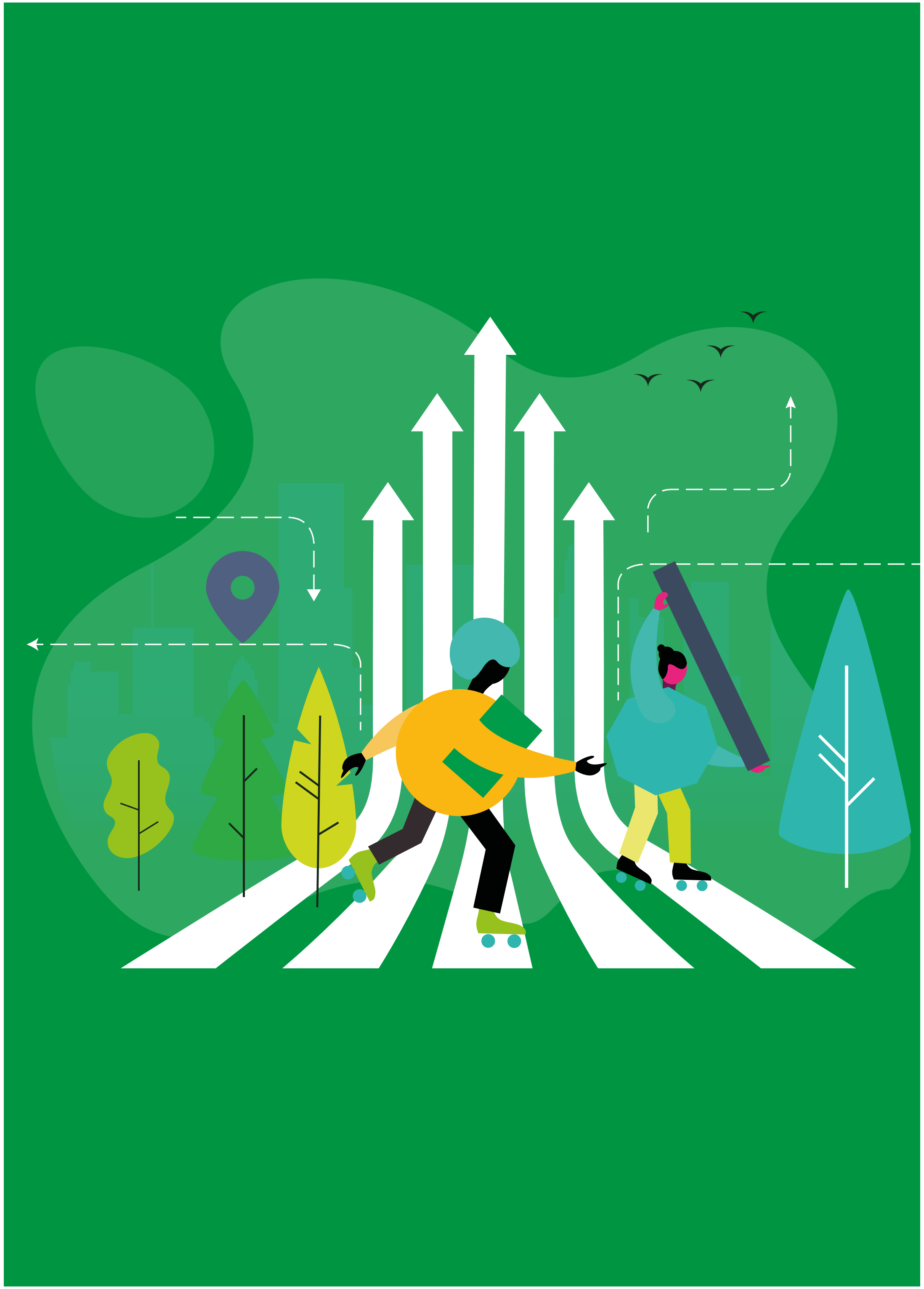
4.
Identify
solution
constraints

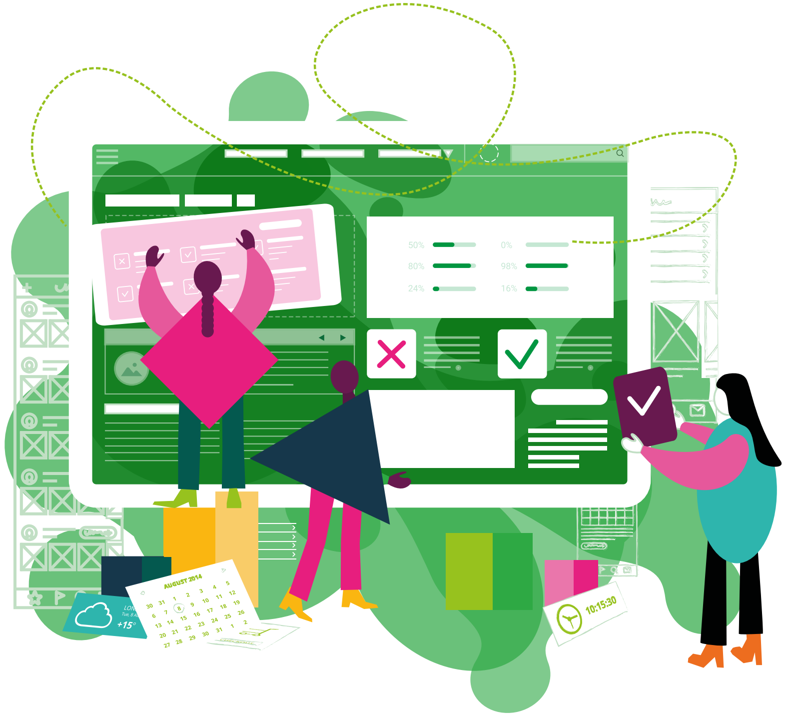
5.
Envision
the learning
experience

At Kineo, we use a five-step approach for all our custom learning design projects. Regardless of the client or the industry, these steps get us and our clients thinking about clear goals and end results. All of our custom coursework projects begin by following these steps.

That's it! We've essentially given you the recipe for our successful custom elearning right there. Simple, right?

Obviously, it takes great people – writers, designers, developers, etc. – to execute these concepts, but this is the foundation that helps those people produce quality work. And because following a recipe takes more than ticking a few boxes, we'll elaborate on each step in the pages ahead.





STEP 1

Create a project charter

Our first step begins with the end in mind. At Kineo we make it a practice to envision the ideal state of learning coursework upon completion, so we work with our client to be crystal clear on their business problems. From there, we can understand the best solution that fits their desired outcomes. This may sound like a dreamy, aspirational discussion, but that's not a totally fair description. This portion of the project workflow comes with a lot of questions.

As learning designers, it's our role at Kineo to push project sponsors and stakeholders to articulate the current state of their learning culture and process. These conversations can be difficult, yet they help us identify past pitfalls and overall attitudes within organisations. It's really the core of how we develop learning content that is truly unique to an organisation. We also use this time to get clearer on the desired outcomes, so we can advance them toward concrete and measurable goals.

This is part of our practice because it broadens our learning design perspective beyond the industry standard and it helps us apply our skills to the individual. Our teams often find themselves asking "why?" a lot, and if the sponsors and project managers can't articulate responses, we see it for the red flag it is and push back on whether they are ready for us to develop a solution or not.

Now you might be thinking that these four parts look somewhat familiar to the steps we've outlined previously in our ingredients section. That's because they're very similar! But that's kind of the point – a strong charter defines the scope of work and sets a tone for your projects in an organised fashion. While these will likely get refined over the course of the project – the more clarity you get and the more specific you are on the desired business goals and outcomes, the easier it will be for all team members and stakeholders to make project-based decisions that move in the right direction.

KEY INGREDIENTS

A completed project charter should have four parts

Problem statement:
What is the impetus for the initiative and what are the associated symptoms?

Business goal(s):
What will change if the initiative (both training and other activities) is successful?

Defining success:
What is our definition of success? Does it match the clients? Agree on this.

Measures of outcomes:
How will results be measured to ensure the program is effective?

STEP 2

Know your audience

Once we've asked our questions and gathered information around change and goals via the project charter, it's important to dive in deeper to see which roles, departments, etc. the coursework will reach. In other words, we need to know our audience. And not just our broad organisation-wide audience – we need to be as detailed as possible and bring that information into our design.

Conducting an audience analysis helps us identify and learn about who we're targeting with our solution. How does each role connect to the business problem? What do they need from this solution in order to achieve the desired outcomes? A common trap that learning designers fall into is trying to create a single solution that meets the needs of all potential audience members. Unfortunately, this one-size-fits-all approach will have you coming up short for everyone.

One helpful technique for understanding audience segmentations is using learner personas. These will help transform your abstract audience segments into more tangible and operational examples. Learner personas craft a fictional user profile or each audience area you're trying to reach. As you develop the learning journey, these profiles will give you a general snapshot of the people you're looking to educate.

Once your relevant persona information has been determined, it helps to assign each profile a name and even a photo. This will make it easy for existing and new project team members to reference each audience when assessing how well the curriculum is meeting needs and requirements. It's also a practice that challenges learning designers to think about content in a human way, as opposed to the all-too-common stiff and robotic presentation of information.

KEY INGREDIENTS

1. Create a project charter
2. **Know your audience**
3. Define performance goals and barriers
4. Identify solution constraints
5. Envision the learning experience

Using learner personas

When building your learner personas, it's important to consider a variety of aspects, including…

Who they are – basics like gender, age range, job, and location.

Background – relevant experience, education level, and how they like to work.

How they spend their day – on the road, in the office, working remote, etc.

Technology – are there certain programs or tools they use on a daily basis?

Attitude – their thoughts on internal learning and development.

Motivation – what do they hope to gain from the curriculum and their role in general?

Skill level – understanding of their best work and knowledge of relevant topics.

Pain points – what has historically prevented effective training in their area previously?

STEP 3

Define performance goals and barriers

As we've identified earlier in our project charter, defining goals is one of the most critical components in how we work on learning design projects. If you don't have specific targets around what you'd like your courses to accomplish all your efforts are at risk of going to waste. That's why we always take the time to get a clear understanding of what learner outcomes are required of the solution and we use our persona work to identify these outcomes on a track level.

This is not inherently difficult; we just make sure we're not cutting corners. It's is as simple as asking "what do you need learners to be able to do that they couldn't or wouldn't do before your solution?" For each persona, take time to clearly articulate the performance goals and any barriers that need to be overcome to achieve those goals. We approach this in three steps...

Step 1: Identify a context for which the business goal is relevant for a persona

Step 2: List the "what they need to do" actions in a context to achieve the business goal

Step 3: Analyse the actions to flesh out any barriers, training, and support needed

KEY INGREDIENTS

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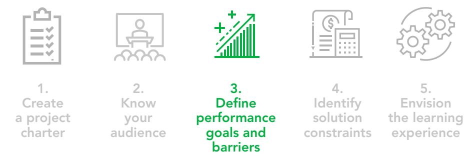
In the example below, we take a look at an example user persona "Regional Ron" and how his role relates to the goals of his organization. There's also additional details to provide context around the specifics of the challenge and some insight as to how often these issues arise.

Persona	Regional Ron, a remote sales representative.
Business Goal	Stay connected and up to date on the latest products and offerings going to market.
Context	Ron is a new hire who completed onboarding at corporate headquarters, but he needs new information as the latest products are launched.
Describe a situation in which Ron has an impact on the goal	Sales staff often rely on word of mouth to get details of the latest products, no formal process is in place and there's no central repository for sales training or resources.
Are they facing this daily? Weekly? Monthly? Or very infrequently?	Monthly or quarterly, as often as new products are released and/or sales strategy changes.

When you have the three steps outlined in the broad sense, it's then time to start outlining the various actions required of your various personas. Many times, we'll create scenario charts that contain hypothetical prompts and respective actions for the situations. Below we show how Ron currently operates in his role. We also spotlight some of the pitfalls that are occurring so we can better equip our teams as they develop solutions that will drive better process and behaviour.

	Action 1: Attend sales meetings remotely and stay up to date	**Action 2:** Proactively reach out about latest information and sales strategy	**Action 3:** Save documents and relevant information for access when needed	**Action 4:** Schedule regular check-ins with managers
If Ron takes these actions today, where does he struggle? What mistakes does he make?	Attending meetings remotely helps keep Ron in the loop, but engagement is low due to a lack of interactivity. He needs more active participation and more opportunities to connect.	Ron tries to be an active participant in meetings and keeps a pulse on what his contacts in the market are looking to learn more about.	All materials are made available to employees after meetings. They are usually sent around via email, but it's up to the individual to save them.	Most employees, including Ron, have regular touch points with their managers where they can discuss the latest strategy and company initiatives.
If he's not doing these actions, what is he doing that he's not supposed to be doing?	Ron attends most meetings, but struggles with different timezones. As a remote employee, schedules can be difficult to coordinate.	Ron attends most meetings, but struggles with engagement and retention as there's not a lot of room for active participation when attending digitally.	Ron's inbox contains a lot of relevant information, but it's hard to find certain materials when he needs them. It's also hard to stay up to date, because it is only accessed as needed.	Employees have to be proactive about scheduling these check-ins. Sometimes other, more immediate items take priority and the check-ins fall by the wayside.

KEY INGREDIENTS



We repeat this process for each persona to get a clear understanding of what each audience group needs to be able to do. In cases where we have more than one goal/desired outcome, we repeat this process further. The idea is to keep going until you have a complete picture. This is the most time-consuming part of the upfront work, but it pays off. As we go through this process, it uncovers the solution we need to meet our audiences' needs, and that guides stakeholders to determine what content is important and relevant to achieving performance and business goals. This exercise also helps us identify where we have overlaps in content for the different audience segments, so we don't duplicate efforts down the line.

Finally, we make sure to document the performance and learning goals for each audience segment as well as all appropriate actions and training scenarios. We'll then share that back with the stakeholders to ensure we have a mutual alignment

Defining goals and barriers

Step 1 – Identify a context for which business goal is relevant for a persona.

Step 2 – List the "what they need to do" actions in a context to achieve the business goal.

Step 3 – Analyse the actions to flesh out any barriers, training, and support needed.

Step 4 – Repeat steps as needed for each segment of your audience.

Additional Insight – When done properly, this portion will be the most tedious but it will also help you the most in the long term. It is designed to uncover overlaps in audience segments to help you avoid duplicating efforts later on.

STEP 4

Identify solution constraints

The reality is that just about any learning project you take on will have constraints. It's better to face this head on than to ignore them and deliver an incomplete solution based on assumptions. Kineo's process uncovers any technological constraints and requirements for your solution before diving in. It's a short step, but a critical one. Here's a few areas where we'll ask questions to better understand constraints.

Technology

We always consider what technology is already in place and how that will affect our work as we design solutions. There's also a matter of determining how to leverage the available technologies for functions like knowledge sharing. Lastly, there are cases where we may recommend new technologies that will set our clients up for success. If there's an opportunity to make a solution more effective from a learning platform perspective, we always do our best to present that option.

Source content

A lot of times the learning source content is already available. Perhaps it is outdated or unclear and in desperate need of an update, but we do take full advantage of the resources that are already in place. For content that needs to be created from scratch, we'll make sure that we have access to the appropriate subject matter experts. This step sets our learning designers up for success by making sure all relevant materials available.

Compliance, assessment, and certification requirements

Lastly, there may be specific compliance requirements that we need to incorporate into the plan. Some certifications come from official third-party sources and we want to make sure it fits seamlessly into the solution we're building when applicable.

KEY INGREDIENTS

Identify solution constraints – key areas and questions

Technology

- What is already in place?
- How will it affect our learning design?
- Can we leverage what's available?
- Should we recommend new tech?

Source Content

- Do our learning designers have what they need?
- Are materials outdated or unclear?
- How can we update content?
- Do we have access to insights from subject matter experts?

Existing compliance requirements

- Is there third-party content that needs to be included?
- Are there any necessary certifications?
- How do we build these items into our courses seamlessly?

STEP 5

Envision the learning experience

At this point in the process, we've done all the homework. We should have a detailed understanding of the challenges, constraints, and overall attitudes of the stakeholders in the project. From there, it's time to present our plan and lay out what we envision the learning journey to be. We've done this enough to know that no two cases are the same, but we've also seen that most successful solutions account for the following steps...

1. Engage	Do we have to capture attention? Or is there an intrinsic motivation for change?
2. Diagnose	How aware is your audience of their abilities? Do they understand weaknesses and knowledge gaps?
3. Learn	What sort of learning solution is most appropriate? Is it a knowledge gap or does behaviour need to change?
4. Apply	How difficult will it be to apply the training to the job? Will practice and support be necessary?
5. Assess	How do we determine the desired outcome was achieved?
6. Reinforce	Are there steps in place to keep the content and information top of mind on an ongoing basis?

The most important aspect of this is the reinforcement piece. We like to think of our solutions as a never-ending story, in the sense that there are always areas for improvement. That's why we design solutions with metrics in mind. We always want to be able to demonstrate course completion rates, performance metrics, and overall engagement with our solutions.

This is also to say that courses may require optimisation after they're rolled out. Fortunately, when following our five-step systematic approach, we never have to start over completely. The true success behind our process comes from working through each piece systematically. From there, it's always easier to figure out which parts of the solution require tweaking and reconstruction as new insights become available from feedback and data.

KEY INGREDIENTS

Optimise your learning

1. Reinforce
There are always ways to improve and adjust to ensure long-term engagement. Find ways to promote your learning solutions on an ongoing basis.

2. Demonstrate
Results are especially impactful, so tell your learning success stories as courses are completed

3. Measure
Go beyond anecdotal evidence and provide metrics on course completion rates, performance and engagement to your stakeholders.

4. Repeat
Take the raw data and user feedback you receive to continue fine tuning your learning solution. Listen, examine, and react to find something that will bring your teams long-term success.

Discover how we're shaping the future of learning

Everything we do at Kineo stems from a simple idea – if we design a better learning experience, together we'll get better results.

Kineo helps the world's leading businesses improve performance through learning and technology. We're proud of our reputation for being flexible and innovative, and of our award-winning work with clients across the world.

Whatever your business challenge, we will partner with you every step of the way to find the learning solution that fits best – and delivers results.

So, how can we help you?
Get in touch about your digital learning challenges.

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