

Business901 Podcast Transcription

Implementing Lean Marketing Systems

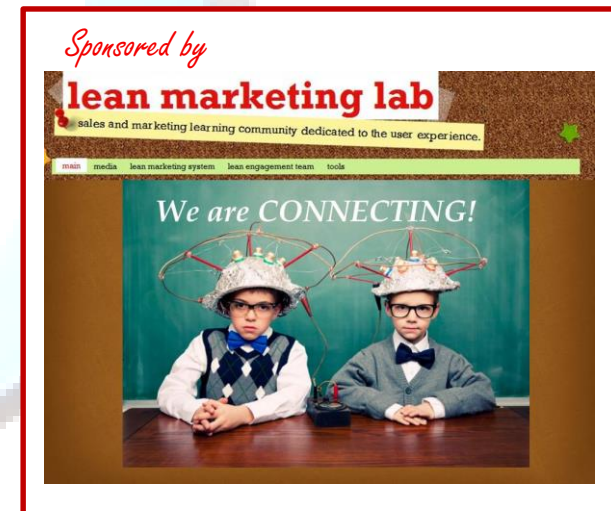


The Path to Better Learning

Guest was Julie Dirksen

Business901

Related Podcast: [A Learning Journey](#)



[A Learning Journey](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Note: This is a transcription of the podcast. It has not gone through a professional editing process and may contain grammatical errors or incorrect formatting.

Transcription of the Podcast

Joe Dager: *Welcome, everyone. This is Joe Dager, the host of the Business901 podcast. With me, today is Julie Dirksen. She is an independent consultant and instructional designer who creates highly interactive e-learning experiences. She has been an adjunct faculty member in the Visualization Department at the Minneapolis College of Art and Design, where she created and taught courses in project management, instructional design, and cognitive psychology. You can find her online at usablelearning.com. Her book, *Design for How People Learn* with an interesting subtitle *Voices that Matter* has been a staple of mine for a while now. Julie, I would like to welcome you and let's start out like you start your book with. It's *The Learner's Journey*. What is it?*

Julie Dirksen: Oh, yes. Good morning. *The Learner's Journey* is really just this idea that we're trying to create an experience for the learner as we usually move from being an absolute novice all the way up to mastery. There are stages along that process, and the experience needs to change the further they move along the journey and the path. One of the questions is, is it a journey or is it more of an environment that we're creating for people or experience that we're creating for people that best fosters are learning? A lot of people are really independent learners these days. That's one of the things that the internet certainly encourages; being able to go "Oh, I need this thing. I guess I'll Google

Business901

Podcast Transcription

Implementing Lean Marketing Systems



it.”

When we’re thinking about learning experiences, are we creating a path for people or a journey for people? Or are we creating an environment that’s going to support them being self-directed in their own learning process.

Joe: *So, in your mind, you’re really mapping out learning journey the same way that I would think of the customer journey in marketing and maybe look at that learner experience a.k.a. customer experience along the way?*

Julie: Yeah, absolutely. One of the things you think a lot about is when somebody’s first starting out, they’re going to need a pretty directed experience. They’re going to need something where there’s a fair amount of structure. When you don’t know anything about a topic, you don’t know what you don’t know, so you need a lot more guidance.

But then as you move along the path, as you move along the journey, you’re going to have more opinions about what you’re interested in and you’re going to have more ability to decide which resources are useful to you and which resources are not useful to you. So, one of the things about the learner journey is it’s usually moving along a path of a more controlled structured experience to having more autonomy and control over your environment as you go along.

Joe: *What strikes me about the things you talk about is that there’s such a variety of destinations for every learner. Even if they’re the same type of individual or different*

Business901

Podcast Transcription



Implementing Lean Marketing Systems

organization is coming to learn this and to use the same product or service, they all kind of have different goals sometimes. How do you deal with that?

Julie: That's an interesting question. One of the things that I try to understand when I'm working with a client on a project or creating a course or workshop of my own is what are the goals that people have. Different learners are going to have really different types of goals and needs in a particular environment.

Some people are just like, "I just need to get some key pieces of information." Get in and get out. Other people really do want much more of that kind of "take me through the process step by step" and "I want to understand the whole thing."

One of the real questions, when you're thinking about designing learning experiences, is how are you accommodating different needs from different learners and different goals for different learners and things like that. It's a challenge but, hopefully, if you can create an environment that has some flexibility in it, people are smart. One of the issues that I have when you're thinking about your end learners is not assuming that they're unmotivated or not assuming that they can't figure things out. They can. They do. Create an environment allows them to make some of their own choices, too.

Joe: *I have to ask you this upfront in the conversation. Is there a difference in designing a learning program over, what I would say, a training program? Do you distinguish them completely different?*

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Julie: That's an interesting question and actually, there's a lot of discussion that goes on in my field (which you could loosely call Learning and Development) around the terms that we use.

You'll hear sometimes people who'll say, "You don't train people. You train dogs." Although I would argue that dogs are learners, too. When I was writing the book, I had to figure out what language I was going to use around it. So, I used language like "learners," and I used language like "learning experiences" rather than training.

Typically, training has been something to describe what happens in an adult workplace setting, which is actually where I work a lot. That's not an expansive enough definition because if you're creating material for an elective college class, it's not really a training situation. People are there because they are genuinely interested in that topic, and they want to learn about it.

We're still trying to figure out what kind of language fits best for those things. I sort of settled on learning design. I'm actually interested in learning experience design as a term because I think that that's potentially useful. I also have background and experience in user experience. So, I think that's potentially an interesting term.

Some of the issues that we deal with in my field is, "Are we really interested in learning at all or are we really interested in things like performance improvement?" How do we help people do their jobs better? How do we help people accomplish things they want to accomplish better? The methods for doing that are not always "learning" or "training."

Business901

Podcast Transcription

Implementing Lean Marketing Systems



There might be other things we can do to help support performance; help people be better at their jobs and help people be better at the goals that they have.

Joe: *I think that the learning experience and the learning experience journey is really what caught my eye. When I first looked at it on Kindle and saw the chapters in the beginning, I thought, "That's someone that really gets it."*

They're not leaving, "here it is, I have to go through it." They're talking about it is a journey because not everybody deals the same way like we talked about; has the same goals. It really truly is a journey with a lot of different paths that try to get to the end result.

Julie: Yeah, absolutely. You mentioned the customer experience map. I've actually been really interested in some of the methods that they're doing for that. The way that they're visualizing customer experience maps because I think that there's definitely a learner experience map and a process that people go through as they learn about things. Moving from novice to intermediate skill to mastery is a really interesting path. Nobody has exactly identical ways to get there but how do you help people do that?

Joe: *I think those are great issues that you come up with and bring to the surface. In your book, you scope out ways to design different learning experiences. You're already talking about for motivation, for the environment, for skills. In each of the learning experiences that I develop, do I need to consider all the factors or sometimes I can leave one out, two out or design specifically for one? Can you explain that a little to me?*

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Julie: Yeah. One of the things that I usually think about when I sit down and am thinking about creating a learning experience is I try to look at what type of thing is it that we're trying to help people learn. I have categories that I have used. I actually have expanded a little bit beyond the categories that I have in the book.

One of the issues with a lot of the ways that teaching happens or learning and development happens is that it's about "I'm just going to give you information." Mostly, information is readily available. We're all carrying around smartphones in our pockets, and we have access to all the information in the world. Just giving people information isn't enough for a good learning experience; in most cases.

There are some cases where information is really all that's required. "We're making some updates to the policy. I just need you to know this stuff." That's just an information problem. So, learning experience that just gives you information is probably a pretty good solution to that. Although, at that point, I'm not even sure if it's a learning experience so much as it is a communication, an update or something like that.

But if you have other kinds of learning, then you need to think about other kinds of experiences. One of the questions I sit down with a piece of content is asking myself, "Is it just a knowledge thing? Something you just need to know. Is it a procedure?" I define procedure as things where there's not a lot of ambiguity. It's just a series of steps you need to follow. For example, how to do something in a piece of software might be a procedural kind of thing. If it's a procedure then what people need to do is be able to see it

Business901

Podcast Transcription

Implementing Lean Marketing Systems



or see a demo and then they just need to be able to practice until they can get pretty good at it, or get some feedback whether they're doing the procedure right.

Then, I have a big bucket around skills. Skills are an interesting one to me because they're really not just an information problem. Certainly, there's information wrapped up in skills. I define skills as anything where you reasonably expect a person to practice in order to develop proficiency at it. If to be good at it, they have to practice, then it's probably a skill. I also think about whether or not the right answer looks different in different situations. If I say, "how should I print an email?" There's probably only one right answer. Maybe a few right answers for how to print an email. But if I say, "how should you design a website?" There's potentially thousands or millions of right answers of how you should design a website.

When the right answer can have a really high degree of variation, that means that your learning experience is probably going to involve practice but it's also going to involve seeing a lot of different examples; being exposed to a lot of different examples and case studies. If I start to understand some of those kinds of things about what the topic is that somebody needs to learn or get good at, that starts pointing me in a certain direction in terms of how I should design the experience.

If I'm going to help people learn how to design websites, then one of the things I know right away is that the learning experience should involve exposures to a lot of different examples. There are other things as well, but that's the kind of logic that I'm hopefully trying to use.

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Also, a new category I've added as I wrote the book is "habits." I think there's a lot of interesting things going on around good habits and helping people promote good habits. The way that you acquire habits is different. It's not like I can just teach you a habit, and that means you'll automatically pick it up and carry it around. There's more to it than that.

There's what's the feedback loop, how are you getting the habit reinforced, not trying to tackle too many habits at once, being very specific and getting one habit up and running smoothly before you try to tackle another one. There's actually some very specific things around how I design for a habit.

You mentioned motivation, which is another interesting one because I define that as anything where people know the right thing to do, and they're still not doing it for some reason. Then you really know it's not a knowledge problem, and you really know it's not a matter of giving people more information.

For example, most people are still not smokers because nobody has happened to mention that smoking is a bad idea. It's now a knowledge problem. It's something else. It has to do with a motivation issue. It's that that gets into complicated things like the way people make decisions and what influences the decisions that they make. This is a situation where people know that they should fill out this form when there's an accident, but it's easier to be just, "That's not that big of an accident. It's no big deal. We're not going to do it." Or they know that they should document their code when they're writing a software program; except when you're in the middle of it, you're just trying to get things done. Or they know

Business901

Podcast Transcription

Implementing Lean Marketing Systems



they shouldn't text while they're driving and yet, "You know, I just need to send my spouse a quick note and it'll just take a second. Traffic stopped anyway."

I define motivation as any of those things where you know what you're supposed to be doing, and you're still not doing it for some reason. A lot of times, the reasons for that then are not really necessary learning problems because they know. That's the whole point. They already know what they're supposed to be doing and so getting into the issue of "why are people not doing it?" There's usually a lot of complicated reasons. I have a whole list of reasons why that happens. Everything from misaligned incentives to unawareness of consequences to increased overhead of action and all sorts of stuff.

Joe: *So we go back to that habit thing of creating that trigger to get them to start doing it occasionally or sometimes or part of it.*

Julie: Yeah, exactly. If something 's a habit, part of the definition of habit is it's usually a small action, and you usually do it automatically or not totally consciously (you don't have to stop fully and make yourself do it, it's something you do automatically overtime). The nice thing is if you develop good habits; then you don't have to spend a lot of energy making them happen. They're just something you do automatically without having to think about very much.

Anything you can do automatically without having to think about it very much, from a cognitive point of view, is low overhead task. You don't have to exert a lot of will power to make it happen. You don't have to exert a lot of cognitive energy to make it happen. If it's

Business901

Podcast Transcription



Implementing Lean Marketing Systems

a good habit, anything that you can get it to that point where it's automatic, it's likely to continue. It's likely to be a behavior that will happen fairly consistently.

Joe: *One of the real treasures I took out of your book is I love the idea of not having to store everything in someone's head, but make it part of the environment.*

Julie: Right.

Joe: *That's a great way for learning experience because it doesn't have to be anything more than, "Okay, the learning experience for this week is you need to put two Post It notes on each side of your computer or something, right?"*

Julie: Yeah. There's a great book by Don Norman called *The Design of Everyday Things*. It has a chapter called "Knowledge in the Head Versus Knowledge in the World." It's this whole question about, "Are we trying to fix the learner? Are we trying to fix the environment?"

Environment can have a big influence. On the behavior and can you just put some hacks or triggers into the environment to increase the likelihood of the behavior as opposed to trying to fix people? Fixing people can be difficult and expensive sometimes. Where along the learners path is the best place for this knowledge to live in order to support performance?

One of the examples that I give is if anybody has ever been to Boston and done the tourist

Business901

Podcast Transcription



Implementing Lean Marketing Systems

thing in Boston. If you want to get the tours around Boston pretty efficiently and not have them get lost and reduce your air rate and all of these kinds of things, you could have a tour guide, give them maps, give them an app for their phone or you could have them learn their way around. There are all sorts of things. Or you could do what Boston did, which is they created the Freedom Trail where they painted a big red line; starting point and an ending point and you follow the big red line that takes you past Congressional Hall, the Old North Church, Paul Revere's house and all of these kind of stuff.

When you've created that path in the environment, the air rates are really low. The level of effort the user has to expend to follow them are really low.

So, one of the questions that I usually ask is, "You want people to do something differently, and that's why you're here talking to me about learning experiences. Can we paint a big red line? Is there a path that we can steer people through that's going to allow them to perform pretty well without us having to teach them a whole set of new behaviors? Sometimes the answer is no. Sometimes the answer really is "you have to learn a whole set of new behaviors." Okay, that's great. We have methods for doing that.

If there is anything that we can do in the environment that helps people perform better in terms of fixing the process or fixing the environment as opposed to trying to fix the user, the cost benefit is actually pretty good. It's usually worth the effort to make some tweaks to the environment rather than trying to fix people.

Joe: *Not everything's new. We have a legacy system in place or something going on. How*

Business901

Podcast Transcription

Implementing Lean Marketing Systems



do you start evaluating your existing learning system or existing training program?

Julie: Oh gosh. This is an interesting one for me because I think, certainly again in my field, one of the things that we've been plagued by is not enough feedback in our system.

One of the things that's happened is in a learning environment or learning system, we're usually not getting enough information back into the system about what's working and what's not working. One of the things you sometimes you see is metrics being used to evaluate a learning system that are things like, "Well, this is the number of people who took it," or "This is the number of hours or training that we did," or things like that; which are really not meaningful metrics at all. They don't really tell you anything about efficacy but the challenge frequently is that we're not set up to collect good performance metrics about how people are doing.

One of the questions that I've been trying to figure out is how can we get a little bit more data into the system even if it's not really quantitative data that proves things even if it's qualitative data that starts giving you some pointers about what's working and what's not working. For example, I'm not a big fan of pre- and post-tests for things because, quite frankly, I feel like most people are not good at writing post-tests that tell you anything meaningful about people's abilities. I think that that same amount of time would be much better used interviewing a handful of people who took the training a little while ago and found out what worked for them, what didn't work for them and what do they still remember. Things like that and bringing that back in.

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Ultimately, for an effective learning system, you really just want to know what's working and what's not working and adjust as needed; which, I think, goes along with a lot of things that's happening in agile methodologies and so forth. It's not trying to project out longer than you reasonably can but trying to make sure that you're setting goals that are focused and targeted and that you're going to be able to work through in a short time frame.

I think learning systems actually need something similar in terms of "We're going to try to do this. We're going to get some data about it back as quickly as possible. If it's working, great. If it's not working, we'll change it. If it is working, we'll do more." That kind of attitude towards learning systems.

I'm not sure if I steered your question in the right direction.

Joe: *I think you did because I always believe that the first thing you need to do is to check and evaluate. The next step you do, once you've checked and evaluated, you need to go verify it with learners (in this case). Then, stop and reflect on it before you plan your next step and you do your next step.*

Julie: Yeah.

Joe: *That's my CAP-Do process I talk about. I think you re-confirmed that in my mind as I was listening to you.*

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Julie: Yes and that's absolutely something I'd like to see things move towards more. It's like the big massive software projects I've seen it happening with learning projects. We're going to plan this big, huge e-learning rollout and we're going to spend six to eight months putting it all together. We're going to design the whole thing. We're going to create it and roll it out. Then I don't know if it's really working or not or I don't know if it's meeting our goals or changing anything about behavior. There's a lot of that going on.

Joe: *If you invested enough time, you'd have to prove that it's working.*

Julie: Exactly.

Joe: *Switch gears a little bit. You don't mention it a lot in your book. You allude to it a couple of times. How does storytelling take a part in learning? It's not really in your book as much. You always hear that you have to tell stories. You always hear that all the time. Could you put some context to that?*

Julie: Yeah, absolutely. There's a whole slew of really interesting reasons why storytelling is particularly powerful from a learning point of view.

One, it's easier to learn something if you already have a framework for it. A lot of times, when we're learning things, when we don't have any context or framework for something, it's hard to hang on to the information. I have this analogy about how your brain is like a closet. Experts have tons and tons of shelves, and it's fairly organized and your novices have, basically, no shelves and a pile of clothes on the floor.

Business901

Podcast Transcription

Implementing Lean Marketing Systems



One of the problems is that experts want to take the entire contents of their closet (all the clothing) and just hand it to novices. "Here. I'm just going to give you all this information about something." One of the challenges with that is that they don't have any way to sort it or organize it when it's handed to them. The way that we build closets, structures or shelves for our information is usually by interacting with the information, solving problems and things like that.

Another thing that we do actually already have some structures for how we understand stories. Whether we know it or not or whether we're conscious of it or not, stories have a pretty predictable structure. I'm going to introduce the main character. There's going to be an event that happens that kicks off the action. There's going to be a series of things that cause rising action. There's going to be a climax that's going to be the big point of the story. There's going to be a follow-up and some explanation afterwards about why I'm telling you this story in the first place.

There's a variation in that obviously. It's not always exactly identical to that. But once somebody starts telling you a story about this one time, you settle into this comfortable place because you're pretty able to predict that sequence of things that somebody's telling you.

When you're using stories for learning, it actually has (again, I'm going to use this term) cognitive load. It actually has a lure of cognitive load because you already have this comfortable framework for how a story is going to work. So, instead of you trying to

Business901

Podcast Transcription

Implementing Lean Marketing Systems



remember a big list of information, you already have buckets to slot the story elements into it. That's one reason why storytelling is great. It's because we already have a framework for it, and we're not trying to learn everything about what we're being told. We can just hang onto the specifics of the story and slot these into familiar buckets.

Another reason is everything that we learn works better if we understand it in context. If I hand you a string of facts about a particular piece of software or something like that, it's hard to hang onto those. But if I explain the story of when you're going to use certain things, what you're going to do and why you might use it, then you have context around it. You have some reason to understand how the pieces fit together, what does it mean and things like that.

A lot of times, one of the things that happen when we're preparing information to teach it to somebody else is we strip out all that context and want it to be right. We want it to be "the right information." But when we take all the context out and when we take all the people out of the equation, we take all the stories out of the equation, then I'm getting all these facts but I don't really know what to do with them. I don't really know when this is important or how important it is or things like that. Stories have that context and sometimes, stories have an emotional context. Not only what should you think about this but how should you feel about it?

That's really important, too. It turns out; we actually use our emotional context as a big part of how we make decisions. There's a brain researcher, Antonio Damasio, who has done a lot of work with people who have had damage to the emotional centers of their

Business901

Podcast Transcription

Implementing Lean Marketing Systems



brain either through strokes, accidents or things like that. These are people who have normal intelligence, but they don't report feeling happy, sad or angry. They just have a very flat emotional absence. He looked at the question of whether or not that made them better or worse decision makers. We have this myth of rational decision-making and this western ideal around logic and this Mr. Spock thing. If we follow that line of reasoning, when you take the emotions out of it, people should be better decision makers.

In actuality, people who have emotional absence are much worse decision makers. Even, "Should I out on a blue shirt or a red shirt this morning?" is hard. We rely on that emotional tug to help us decide "Is this important? Is it not important? Should I care about this? How should I feel about it? Is it a good thing? Is it a bad thing? All this kind of stuff.

When we have that completely missing, it's really hard to decide what to do with it. So, when my financial advisors are putting three mutual funds in front of me and ask, "Which one do you like?" I'm like, "Well, I don't like any of them. I don't know enough to like any of them. I don't have any feeling about it. At this certain point, I can't really make a decision because there's nothing for me to hang on to, or that nudges me in one direction or another. At that point, I'm picking the middle one. It's the easiest one or something like that.

Storytelling helps us understand the context. Sometimes it has an emotional context to it. Here's how you should feel about this because that's going to help you make decisions in the future.

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Additionally, it seems like we have a little bit of a brain mechanism for how we parse and retain story memory. One of the nice things about that is, if I'm giving you factual information over here, but I'm also telling you a story about it, we're doubling up the likelihood that you're going to remember it. We're giving you more hooks back into the information and things like that.

That's my somewhat complex explanation for why stories are good.

Joe: *I think that's great because what I'm thinking of is that learning is more than a hierarchy structure, especially adult learning. It's a messy Venn type thing where you enter into a pod or you enter into a section, and you learn and learn another section of it because you frame the context of what you need to know, and you go around it. Learning systems are built that way. Is that a fair analogy?*

Julie: Yeah. I think we're trying to figure that out. One of the things that's clearly going on is the social aspect of learning. We've always been social learners the way that technology is increasing to support that. It's pretty amazing.

When we're thinking about learning experiences, there's formal step-by-step stuff. We still need that for things particularly when we don't have any context for something when they're brand new to a topic. We still need that formal learning system. But then. As we move out, we also need to think about how are people getting practice? How are people getting feedback on their performance? How are people able to do that? How are we handling things like coaching and mentoring?

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Then, when we move another step out, how are we creating a really rich environment where people can access a lot of resources, ask questions, or get to the information to they need? How do we help people have a learning community? Some circles say the term is PLN, which is your Personal Learning Network. That's all the people that you know that help you learn and know stuff. We distribute our cognition across out networks.

For example, there are things that I don't bother to learn anymore because I know I can find it in my phone in a minute. Or there are things I don't bother to keep up to date on because I know my friend Brian is keeping up to date on it. If I have a question, I can just ask him. There's just a bunch of different ways and strategies that we have to manage what we know and what information we have access to makes the whole thing a lot more complex. But it also means that we have just a lot more opportunities, too.

Joe: *A software package that I updated recently had one of the best things on it that I saw. They have three buttons at the top of the page: Basic, Guided, and Advanced. I can hit "Basic" because I'm only doing a basic function. Once you say, "edit in a podcast," I'm only using two, three or four functions, and I don't need all the other garbage in my way. I don't need that toolbar full of different things.*

Julie: Right.

Joe: *I get that. That's the way more things should be set up because I get all these options like your regular toolbar on a software package. I have eighty things up there, and I'm only using ten at best.*

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Julie: Yeah and there's no way that the designers can know which ten you're likely to use. They know which ten you're likely to use, but they're giving you choices so that you could decide.

Joe: Right.

Julie: If you know you're doing something weird, complicated, and funky, but it's a very specific thing that you need to be able to do, then you can channel yourself into advanced. You don't like systems that are too catered to things because you don't want to feel funneled out. You want to be able to see your options. Everybody likes to know what their options are.

But people giving people tools for figuring out "This is where I probably need to be," but not feeling restricted. Not feeling you couldn't back out and go back down the advanced path if you wanted to or things like that. That's part of it. Trusting your learners and making sure they have control over their choices and their environment, too.

Joe: *Is there anything that you would like to add that maybe I didn't ask?*

Julie: I'm really super pleased that you found the book useful. The audience that I was really thinking of for this book is everybody who has to teach something or educates people on things and giving them some good understanding of not only what to do, but why you do it. So many people have subject matter expertise in one area, and they get

Business901

Podcast Transcription

Implementing Lean Marketing Systems



asked to communicate it to somebody else, or it becomes part of their job to communicate it to somebody else. That's what I was really the audience that I was hoping this would be. It sounds like it's been useful for you, so I'm really pleased about that.

Joe: *Oh, it's a very good book. I've enjoyed it tremendously. What's the best way for someone to learn more and contact you?*

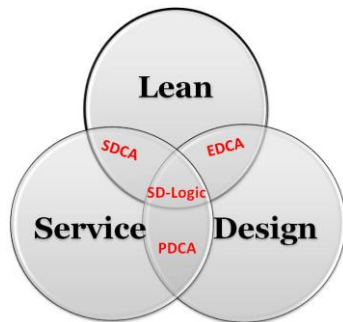
Julie: Probably through the website, usablelearning.com. I have contact information in there. My favorite thing pretty much is Nerdy Shop Talk so I'm always happy to chat about stuff.

Joe: *Well, I would like to thank you very much, Julie. It's my pleasure. This podcast will be available in the Business901 iTunes store and the Business901 blog site. Thanks, everyone.*

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Business901

Joseph T. Dager

Business901

Phone: 260-918-0438

Skype: Biz901

Fax: 260-818-2022

Email: jtdager@business901.com

Website: <http://www.business901.com>

Twitter: [@business901](https://twitter.com/business901)

Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

[Visit the Lean Marketing Lab](#): Being part of this community will allow you to interact with like-minded individuals and organizations, purchase related tools, use some free ones and receive feedback from your peers.